Australian Government

BSB07 Business Services Training Package

Release: 6.0

CONTENTS

BSB07 Business Services Training Package 28
Training Package Details 29
Preliminary Information 31
Overview 31
History 36
Qualifications Framework 37
Qualification Pathways 44
List of AQF Qualifications in BSB07 Version 6 44
Skill Sets in this Training Package 47
Units of Competency in this Training Package 48
Imported Units of Competency in this Training Package 72
Mapping of qualifications to previous version of Training Package 74
Mapping of units to previous version of Training Package 75
Historical and General Information 83
Introduction to the Industry 99
Competency Standards - Industry Contextualisation 104
Employability Skills 110
Assessment Guidelines 114
Appendices 136
BSB10107 Certificate I in Business 164
BSB20107 Certificate II in Business 168
BSB20211 Certificate II in Customer Contact 172
BSB30110 Certificate III in Business 175
BSB30211 Certificate III in Customer Contact 180
BSB30307 Certificate III in Micro Business Operations 184
BSB30407 Certificate III in Business Administration 189
BSB30507 Certificate III in Business Administration(International Education) 195
BSB30607 Certificate III in International Trade 201
BSB30707 Certificate III in Occupational Health and Safety 207
BSB30807 Certificate III in Recordkeeping 212
BSB30907 Certificate III in Business Administration (Education) 217
BSB31007 Certificate III in Business Administration (Legal) 224
BSB31107 Certificate III in Business Administration (Medical) 230
BSB40107 Certificate IV in Advertising 236
BSB40110 Certificate IV in Legal Services 242
BSB40207 Certificate IV in Business 246
BSB40311 Certificate IV in Customer Contact 252
BSB40407 Certificate IV in Small Business Management 256
BSB40507 Certificate IV in Business Administration 261
BSB40610 Certificate IV in Business Sales 267
BSB40707 Certificate IV in Franchising 273
BSB40807 Certificate IV in Frontline Management 278
BSB40907 Certificate IV in Governance 283
BSB41007 Certificate IV in Human Resources 288
BSB41107 Certificate IV in International Trade 293
BSB41307 Certificate IV in Marketing 299
BSB41407 Certificate IV in Occupational Health and Safety 305
BSB41507 Certificate IV in Project Management 310
BSB41607 Certificate IV in Purchasing 314

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BSB41707 Certificate IV in Recordkeeping 319
BSB41807 Certificate IV in Unionism and Industrial Relations 324
BSB41910 Certificate IV in Business (Governance) 330
BSB50107 Diploma of Advertising 335
BSB50110 Diploma of Legal Services....341
BSB50207 Diploma of Business....345
BSB50311 Diploma of Customer Contact....351
BSB50407 Diploma of Business Administration 356
BSB50507 Diploma of Franchising....361
BSB50607 Diploma of Human Resources Management....366
BSB50710 Diploma of Business (Governance) 371
BSB50807 Diploma of International Business....376
BSB51107 Diploma of Management....381
BSB51207 Diploma of Marketing....386
BSB51307 Diploma of Occupational Health and Safety....392
BSB51407 Diploma of Project Management 397
BSB51507 Diploma of Purchasing....401
BSB51607 Diploma of Quality Auditing 407
BSB51707 Diploma of Recordkeeping 412
BSB51807 Diploma of Unionism and Industrial Relations 417
BSB60110 Advanced Diploma of Advertising 423
BSB60207 Advanced Diploma of Business 429
BSB60407 Advanced Diploma of Management....434
BSB60507 Advanced Diploma of Marketing....439
BSB60607 Advanced Diploma of Occupational Health and Safety....445
BSB60707 Advanced Diploma of Project Management 450
BSB60807 Advanced Diploma of Recordkeeping 454
BSB60907 Advanced Diploma of Management (Human Resources) 459
BSBSS00001 Aspiring Supervisor Skill Set 467
BSBSS00002 Basic Contact Centre Operations Skill Set 469
BSBSS00003 Copyright Skill Set....471
BSBSS00004 Design Fundamentals Skill Set....473
BSBSS00005 Design Protection Skill Set 475
BSBSS00006 Franchising Skill Set 477
BSBSS00007 Governance Induction Skill Set 479
BSBSS00008 Innovation Leadership Skill Set....481
BSBSS00009 Innovation Practice Skill Set....483
BSBSS00010 Intellectual Property Strategic Management Skill Set 485
BSBSS00011 Key Management Skill Set 487
BSBSS00012 Key Recordkeeping Skill Set....489
BSBSS00013 Legal Transcription Skill Set 491
BSBSS00014 Managing Innovation Skill Set....493
BSBSS00015 Medical Transcription Skill Set 495
BSBSS00016 Patent Skill Set....497
BSBSS00017 Small Business Contracting Skill Set....499
BSBSS00018 Small Business Financial Management Skill Set....501
BSBSS00019 Small Business Home Based Business Skill Set 503
BSBSS00020 Small Business Indigenous Corporate Governance Skill Set 505
BSBSS00021 Small Business Intellectual Property Skill Set....507
BSBSS00022 Small Business Marketing Skill Set 509
BSBSS00023 Small Business Operations Preparatory Skill Set 511
BSBSS00024 Small Business Preparatory Skill Set 513
BSBSS00025 Trade Mark Skill Set 515

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BSBADM101A Use business equipment and resources....517
BSBADM301B Produce texts from shorthand notes....523
BSBADM302B Produce texts from notes....529
BSBADM303B Produce texts from audio transcription....535
BSBADM307B Organise schedules....541
BSBADM311A Maintain business resources....547
BSBADM401B Produce complex texts from shorthand notes....553
BSBADM405B Organise meetings....559
BSBADM406B Organise business travel....566
BSBADM407B Administer projects....574
BSBADM409A Coordinate business resources....582
BSBADM411A Produce complex texts from audio transcription....588
BSBADM502B Manage meetings....594
BSBADM503B Plan and manage conferences....602
BSBADM504B Plan or review administrative systems....611
BSBADM506B Manage business document design and development....618
BSBADV402B Conduct pre campaign testing....625
BSBADV403B Monitor advertising production....631
BSBADV404B Schedule advertisements....638
BSBADV405A Perform media calculations....644
BSBADV406A Buy and monitor media....650
BSBADV407A Apply media analysis and processing tools....656
BSBADV408A Review advertising media options....662
BSBADV503B Coordinate advertising research....668
BSBADV507B Develop a media plan....676
BSBADV509A Create mass print media advertisements....686
BSBADV510A Create mass electronic media advertisements....693
BSBADV602B Develop an advertising campaign....701
BSBADV603B Manage advertising production....709
BSBADV604B Execute an advertising campaign....717
BSBADV605B Evaluate campaign effectiveness....723
BSBATSIC411C Communicate with the community....730
BSBATSIC412A Maintain and protect cultural values in the organisation....736
BSBATSIC511A Plan and conduct a community meeting....744
BSBATSIL408C Manage a board meeting....751
BSBATSIL411A Undertake the roles and responsibilities of a board member....758
BSBATSIL412A Participate effectively as a board member....766
BSBATSIL413A Review and apply the constitution....772
BSBATSIL503C Manage conflict....778
BSBATSIL510A Appoint and work with a manager....784
BSBATSIL511A Lead the organisation's strategic planning cycle....791
BSBATSIL512A Be a leader in the community....798
BSBATSIM412B Implement a business like approach....805
BSBATSIM414C Oversee the organisation's annual budget....810
BSBATSIM416A Oversee organisational planning....816
BSBATSIM417A Implement organisational plans....824
BSBATSIM418A Oversee financial management....831
BSBATSIM419A Contribute to the development and implementation of organisational policies....837
BSBATSIM420A Oversee asset management....843
BSBATSIM421A Support a positive and culturally appropriate workplace culture....850
BSBATSIM505C Control organisational finances....857
BSBATSIM506C Develop employment policies....864

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BSBATSIM511C Develop enterprise opportunities 870
BSBATSIM514A Recruit and induct staff 877
BSBATSIW416C Obtain and manage consultancy services....884
BSBATSIW417C Select and use technology....890
BSBATSIW514C Represent your organisation 896
BSBATSIW515C Secure funding 902
BSBAUD402B Participate in a quality audit....908
BSBAUD501B Initiate a quality audit....916
BSBAUD503B Lead a quality audit 924
BSBAUD504B Report on a quality audit....930
BSBCCO203A Conduct customer contact....937
BSBCCO204A Collect data....944
BSBCCO205A Prepare for work in a customer contact environment....949
BSBCCO301B Use multiple information systems....955
BSBCCO302B Deploy customer service field staff 961
BSBCCO303B Conduct a telemarketing campaign....967
BSBCCO304C Provide sales solutions to customers 974
BSBCCO305B Process credit applications 980
BSBCCO306B Process complex accounts....986
BSBCCO307A Work effectively in customer contact....992
BSBCCO308A Conduct outbound customer contact 998
BSBCCO309A Develop product and service knowledge for customer contact operation1005
BSBCCO403A Schedule customer contact activity 1010
BSBCCO404A Collect, analyse and record information....1016
BSBCCO405A Survey stakeholders to gather and record information 1022
BSBCCO406A Run a multicentre 1028
BSBCCO407A Administer customer contact technology....1033
BSBCCO501B Develop business continuity strategy....1039
BSBCCO502A Establish a multicentre....1045
BSBCCO503A Manage data interrogation 1051
BSBCCO504A Integrate customer contact operations in the organisation....1057
BSBCCO601B Optimise customer contact operations....1063
BSBCCO602B Manage customer contact information 1069
BSBCCO603B Design and launch new customer contact facilities....1075
BSBCCO604B Develop and maintain a service level strategy....1082
BSBCCO605B Develop and maintain a customer contact marketing strategy....1088
BSBCCO606B Forecast and plan using customer contact traffic information analysis .1095
BSBCCO607B Manage customer contact centre staffing 1101
BSBCCO608B Manage customer contact operational costs 1108
BSBCMM101A Apply basic communication skills....1115
BSBCMM201A Communicate in the workplace....1121
BSBCMM301B Process customer complaints....1127
BSBCMM401A Make a presentation....1133
BSBCMM402A Implement effective communication strategies....1140
BSBCMM501A Develop and nurture relationships 1148
BSBCMN311B Maintain workplace safety....1155
BSBCOM401B Organise and monitor the operation of compliance management system1163
BSBCOM402B Implement processes for the management of a breach in compliance requirements 1175
BSBCOM403B Provide education and training on compliance requirements and systems1185
BSBCOM404B Promote and liaise on compliance requirements, systems and related issues1197
BSBCOM405A Promote compliance with legislation....1211
BSBCOM406A Conduct work within a compliance framework....1217

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BSBCOM501B Identify and interpret compliance requirements 1223
BSBCOM502B Evaluate and review compliance 1233
BSBCOM503B Develop processes for the management of breaches in compliance requirements 1243
BSBCOM601B Research compliance requirements and issues 1252
BSBCOM602B Develop and create compliance requirements 1261
BSBCOM603C Plan and establish compliance management systems 1271
BSBCON401A Work effectively in a business continuity context 1281
BSBCON601B Develop and maintain business continuity plans 1290
BSBCON701A Establish and review the business continuity management framework and strategies 1301
BSBCRT101A Apply critical thinking techniques 1309
BSBCRT301A Develop and extend critical and creative thinking skills 1317
BSBCRT401A Articulate, present and debate ideas 1326
BSBCRT402A Collaborate in a creative process 1333
BSBCRT403A Explore the history and social impact of creativity 1340
BSBCRT501A Originate and develop concepts 1346
BSBCRT601A Research and apply concepts and theories of creativity 1355
BSBCUS201B Deliver a service to customers 1363
BSBCUS301B Deliver and monitor a service to customers 1369
BSBCUS401B Coordinate implementation of customer service strategies 1376
BSBCUS402B Address customer needs 1383
BSBCUS403B Implement customer service standards 1389
BSBCUS501C Manage quality customer service 1394
BSBDES201A Follow a design process 1400
BSBDES202A Evaluate the nature of design in a specific industry context 1407
BSBDES301A Explore the use of colour 1413
BSBDES302A Explore and apply the creative design process to 2D forms 1419
BSBDES303A Explore and apply the creative design process to 3D forms 1426
BSBDES304A Source and apply design industry knowledge 1433
BSBDES305A Source and apply information on the history and theory of design 1440
BSBDES401A Generate design solutions 1446
BSBDES402A Interpret and respond to a design brief 1455
BSBDES403A Develop and extend design skills and practice 1463
BSBDES501A Implement design solutions 1470
BSBDES502A Establish, negotiate and refine a design brief 1477
BSBDES601A Manage design realisation 1485
BSBDES602A Research global design trends 1492
BSBDES701A Research and apply design theory 1499
BSBDIV301A Work effectively with diversity 1506
BSBDIV501A Manage diversity in the workplace 1512
BSBDIV601A Develop and implement diversity policy 1519
BSBDIV701A Develop cross cultural communication and negotiation strategies 1526
BSBEBU401A Review and maintain a website 1534
BSBEBU501A Investigate and design e business solutions 1540
BSBEBU502A Implement e business solutions 1548
BSBEDU301A Assist with monitoring compliance in international education services 1555
BSBEDU302A Assist in resolution of issues and incidents in an international education environment 1564
BSBEDU303A Assist with the provision of international education information 1574
BSBEDU304A Assist with the provision of pastoral care services to international students 1583
BSBEDU305A Assist with international education events and programs 1592
BSBEDU401A Coordinate provision of pastoral care services to international students 1602

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BSBEDU501A Facilitate international education compliance 1612
BSBEDU502A Manage international education issues and incidents 1621
BSBEDU503A Manage international student recruitment and selection 1631
BSBEDU504A Manage international education and training processes 1641
BSBEDU505A Manage international client accommodation services 1650
BSBEDU506A Facilitate international education events and programs 1658
BSBEDU507A Manage transnational offshore education programs 1668
BSBEDU508A Manage international education financial and administrative processes 1677
BSBEDU509A Use information to enhance international education work role performance 1687
BSBEDU701A Investigate current trends in internationalisation of education 1695
BSBEDU702A Establish international onshore education initiatives 1703
BSBEDU703A Establish transnational offshore education initiatives 1712
BSBEDU704A Conduct applied international education research 1720
BSBEMS401B Develop and implement business development strategies to expand client base 1726
BSBEMS402B Develop and implement strategies to source and assess candidates 1732
BSBEMS403B Develop and provide employment management services to candidates 1739
BSBEMS404B Manage the recruitment process for client organisations 1746
BSBFIA301A Maintain financial records 1753
BSBFIA302A Process payroll 1760
BSBFIA303A Process accounts payable and receivable 1767
BSBFIA304A Maintain a general ledger 1776
BSBFIA401A Prepare financial reports 1782
BSBFIA402A Report on financial activity 1788
BSBFIA501A Report on finances related to international business 1796
BSBFIM501A Manage budgets and financial plans 1805
BSBFIM502A Manage payroll 1813
BSBFIM601A Manage finances 1821
BSBFIM701A Manage financial resources 1828
BSBFLM303C Contribute to effective workplace relationships 1837
BSBFLM305C Support operational plan 1844
BSBFLM306C Provide workplace information and resourcing plans 1852
BSBFLM309C Support continuous improvement systems and processes 1860
BSBFLM311C Support a workplace learning environment 1868
BSBFLM312C Contribute to team effectiveness 1876
BSBFRA301B Work within a franchise 1883
BSBFRA401B Manage compliance with franchisee obligations and legislative requirements 1889
BSBFRA402B Establish a franchise 1896
BSBFRA403B Manage relationship with franchisor 1902
BSBFRA404B Manage a multiple site franchise 1908
BSBFRA501B Establish a franchise operation 1915
BSBFRA502B Manage a franchise operation 1921
BSBFRA503B Manage establishment of new sites or regions 1927
BSBFRA504B Manage relationships with franchisees 1935
BSBFRA505B Manage closure of a franchise 1941
BSBGOV401A Implement Board member responsibilities 1947
BSBGOV402A Work within organisational structure 1954
BSBGOV403A Analyse financial reports and budgets 1961
BSBHRM401A Review human resources functions 1968
BSBHRM402A Recruit, select and induct staff 1974
BSBHRM403A Support performance management process 1980
BSBHRM501A Manage human resources services 1986

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BSBHRM502A Manage human resources management information systems 1992
BSBHRM503B Manage performance management systems 1998
BSBHRM504A Manage workforce planning 2005
BSBHRM505B Manage remuneration and employee benefits 2012
BSBHRM506A Manage recruitment selection and induction processes 2018
BSBHRM507A Manage separation or termination 2025
BSBHRM509A Manage rehabilitation or return to work programs 2032
BSBHRM510A Manage mediation processes 2038
BSBHRM511A Manage expatriate staff 2045
BSBHRM602B Manage human resources strategic planning 2051
BSBHRM604A Manage employee relations 2057
BSBIND201A Work effectively in a business environment 2064
BSBIND301A Work effectively in an educational environment 2071
BSBIND302A Work effectively in the international education services industry 2080
BSBINM201A Process and maintain workplace information 2088
BSBINM202A Handle mail 2094
BSBINM301A Organise workplace information 2102
BSBINM302A Utilise a knowledge management system 2109
BSBINM303A Handle receipt and despatch of information 2115
BSBINM401A IMPLEMENT WORKPLACE INFORMATION SYSTEM 2123
BSBINM501A Manage an information or knowledge management system 2129
BSBINM601A Manage knowledge and information 2136
BSBINN201A Contribute to workplace innovation 2143
BSBINN301A Promote innovation in a team environment 2150
BSBINN501A Establish systems that support innovation 2158
BSBINN502A Build and sustain an innovative work environment 2166
BSBINN601B Manage organisational change 2174
BSBINN801A Lead innovative thinking and practice 2181
BSBINT301B Apply knowledge of the international trade environment to complete work 2190
BSBINT302B Apply knowledge of legislation relevant to international trade to complete work 2196
BSBINT303B Organise the importing and exporting of goods 2202
BSBINT304B Assist in the international transfer of services 2210
BSBINT305B Prepare business documents for the international trade of goods 2217
BSBINT306B Apply knowledge of international finance and insurance to complete work requirements 2225
BSBINT401B Research international business opportunities 2232
BSBINT405B Apply knowledge of import and export international conventions, laws and finance 2238
BSBINT407B Prepare business advice on export Free on Board Value 2245
BSBINT408B Prepare business advice on the taxes and duties for international trade transactions 2251
BSBINT409B Plan for international trade 2257
BSBIPR301A Comply with organisational requirements for protection and use of intellectual property 2265
BSBIPR401A Use and respect copyright 2272
BSBIPR402A Protect and use new inventions and innovations 2282
BSBIPR403A Protect and use brands and business identity 2290
BSBIPR404A Protect and use innovative designs 2298
BSBIPR405A Protect and use intangible assets in small business 2306
BSBIPR501A Manage intellectual property to protect and grow business 2315
BSBIPR601A Develop and implement strategies for intellectual property management 2325
BSBITA401A Design databases 2334

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BSBITA601A Configure and optimise customer contact technology....2341
BSBITB501A Establish and maintain a workgroup computer network....2347
BSBITB701A Implement advanced electronic technologies....2355
BSBITS401B Maintain business technology....2364
BSBITU101A Operate a personal computer....2371
BSBITU102A Develop keyboard skills....2377
BSBITU201A Produce simple word processed documents....2382
BSBITU202A Create and use spreadsheets....2390
BSBITU203A Communicate electronically....2398
BSBITU301A Create and use databases....2405
BSBITU302B Create electronic presentations....2412
BSBITU303A Design and produce text documents....2420
BSBITU304A Produce spreadsheets....2428
BSBITU305A Conduct online transactions....2436
BSBITU306A Design and produce business documents....2442
BSBITU307A Develop keyboarding speed and accuracy....2449
BSBITU309A Produce desktop published documents....2454
BSBITU401A Design and develop complex text documents....2461
BSBITU402A Develop and use complex spreadsheets....2470
BSBITU404A Produce complex desktop published documents....2478
BSBLED101A Plan skills development....2486
BSBLED301A Undertake e-learning....2492
BSBLED401A Develop teams and individuals....2500
BSBLED501A Develop a workplace learning environment....2507
BSBLED502A Manage programs that promote personal effectiveness....2514
BSBLED503A Maintain and enhance professional practice....2521
BSBLED701A Lead personal and strategic transformation....2529
BSBLED702A Lead learning strategy implementation....2538
BSBLED703A Implement improved learning practice....2549
BSBLED704A Review enterprise e learning systems and solutions implementation....2558
BSBLED705A Plan and implement a mentoring program....2569
BSBLED706A Plan and implement a coaching strategy....2578
BSBLED707A Establish career development services....2588
BSBLED708A Conduct a career development session....2597
BSBLED709A Identify and communicate trends in career development....2606
BSBLED710A Develop human capital....2615
BSBLEG301A Apply knowledge of the legal system to complete tasks....2623
BSBLEG302A Carry out search of the public record....2635
BSBLEG303A Deliver court documentation....2644
BSBLEG304A Apply the principles of confidentiality and security within the legal environment....2652
BSBLEG305A Use legal terminology in order to carry out tasks....2660
BSBLEG306A Maintain records for time and disbursements in a legal practice....2667
BSBLEG308A Assist in prioritising and planning activities in a legal practice....2675
BSBLEG403B Maintain trust accounts....2683
BSBLEG413A Identify and apply the legal framework....2689
BSBLEG414A Establish and maintain a file in legal services....2695
BSBLEG415A Apply the principles of contract law....2705
BSBLEG416A Apply the principles of the law of torts....2710
BSBLEG417A Apply the principles of evidence law....2715
BSBLEG418A Produce complex legal documents....2720
BSBLEG510A Apply legal principles in family law matters....2727
BSBLEG511A Apply legal principles in criminal law matters....2735

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BSBLEG512A Apply legal principles in property law matters 2743
BSBLEG513A Apply legal principles in corporation law matters 2751
BSBLEG514A Assist with civil procedure 2759
BSBLEG515A Apply legal principles in wills and probate matters 2766
BSBMED301B Interpret and apply medical terminology appropriately 2773
BSBMED302B Prepare and process medical accounts 2781
BSBMED303B Maintain patient records 2790
BSBMED304B Assist in controlling stocks and supplies 2797
BSBMED305B Apply the principles of confidentiality, privacy and security within the medical environment 2803
BSBMED401B Manage patient record keeping system 2809
BSBMGT401A Show leadership in the workplace 2815
BSBMGT402A Implement operational plan 2820
BSBMGT403A Implement continuous improvement 2827
BSBMGT404A Lead and facilitate off site staff 2833
BSBMGT405A Provide personal leadership 2839
BSBMGT406A Plan and monitor continuous improvement 2846
BSBMGT502B Manage people performance 2853
BSBMGT515A Manage operational plan 2860
BSBMGT516C Facilitate continuous improvement 2867
BSBMGT605B Provide leadership across the organisation 2874
BSBMGT608C Manage innovation and continuous improvement 2881
BSBMGT615A Contribute to organisation development 2888
BSBMGT616A Develop and implement strategic plans 2895
BSBMGT617A Develop and implement a business plan 2901
BSBMGT618A Develop a contact centre business plan 2907
BSBMKG401B Profile the market 2913
BSBMKG402B Analyse consumer behaviour for specific markets 2923
BSBMKG408B Conduct market research 2930
BSBMKG409A Design direct response offers 2939
BSBMKG410A Test direct marketing activities 2947
BSBMKG411A Analyse direct marketing databases 2954
BSBMKG412A Conduct e-marketing communications 2961
BSBMKG413A Promote products and services 2968
BSBMKG414B Undertake marketing activities 2975
BSBMKG415A Research international markets 2982
BSBMKG416A Market goods and services internationally 2989
BSBMKG501B Identify and evaluate marketing opportunities 2996
BSBMKG502B Establish and adjust the marketing mix 3003
BSBMKG506B Plan market research 3011
BSBMKG507A Interpret Market Trends And Developments 3020
BSBMKG508A Plan direct marketing activities 3028
BSBMKG509A Implement and monitor direct marketing activities 3034
BSBMKG510B Plan e-marketing communications 3042
BSBMKG511A Analyse data from international markets 3050
BSBMKG512A Forecast international market and business needs 3057
BSBMKG513A Promote products and services to international markets 3066
BSBMKG514A Implement and monitor marketing activities 3074
BSBMKG515A Conduct a marketing audit 3081
BSBMKG516B Profile international markets 3088
BSBMKG517A Analyse consumer behaviour for specific international markets 3096
BSBMKG518A Plan and implement services marketing 3103
BSBMKG519A Plan and implement business-to-business marketing 3111

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BSBMKG520A Manage compliance within the marketing legislative framework.....3118
BSBMKG521A Plan and implement sponsorship and event marketing 3126
BSBMKG522A Plan measurement of marketing effectiveness 3134
BSBMKG523A Design and develop an integrated marketing communication plan.....3141
BSBMKG603B Manage the marketing process 3150
BSBMKG605B Evaluate international marketing opportunities.....3157
BSBMKG606B Manage international marketing programs 3166
BSBMKG607B Manage market research.....3175
BSBMKG608A Develop organisational marketing objectives.....3182
BSBMKG609A Develop a marketing plan 3190
BSBMKG610A Develop, implement and monitor a marketing campaign.....3198
BSBMKG611A Manage measurement of marketing effectiveness 3204
BSBOHS201A Participate in OHS processes 3211
BSBOHS301B Apply knowledge of OHS legislation in the workplace 3218
BSBOHS302B Participate effectively in OHS communication and consultative processes3225
BSBOHS303B Contribute to OHS hazard identification and risk assessment 3233
BSBOHS304B Contribute to OHS hazard control 3242
BSBOHS305B Contribute to OHS issue resolution 3250
BSBOHS306B Contribute to implementing emergency prevention activities and response procedures 3257
BSBOHS307B Participate in OHS investigations 3264
BSBOHS401B Contribute to the implementation of a systematic approach to managing OHS.....3271
BSBOHS402B Contribute to the implementation of the OHS consultation process 3279
BSBOHS403B Identify hazards and assess OHS risks 3287
BSBOHS404B Contribute to the implementation of strategies to control OHS risk.....3296
BSBOHS405B Contribute to the implementation of emergency procedures 3305
BSBOHS406C Use equipment to conduct workplace monitoring.....3314
BSBOHS407A Monitor a safe workplace 3323
BSBOHS408A Assist with compliance with OHS and other relevant laws 3331
BSBOHS501B Participate in the coordination and maintenance of a systematic approach to managing OHS.....3338
BSBOHS502B Participate in the management of the OHS information and data systems3348
BSBOHS503B Assist in the design and development of OHS participative arrangements3358
BSBOHS504B Apply principles of OHS risk management 3367
BSBOHS505C Manage hazards in the work environment 3379
BSBOHS506B Monitor and facilitate the management of hazards associated with plant3389
BSBOHS507B Facilitate the application of principles of occupational health to control OHS risk 3405
BSBOHS508B Participate in the investigation of incidents 3415
BSBOHS509A Ensure a safe workplace 3425
BSBOHS601B Develop a systematic approach to managing OHS.....3432
BSBOHS602B Develop OHS information and data analysis and reporting and recording processes 3443
BSBOHS603B Analyse and evaluate OHS risk.....3457
BSBOHS604B Apply ergonomic principles to control OHS risk 3467
BSBOHS605B Apply occupational hygiene principles to control OHS risk 3477
BSBOHS606B Develop and implement crisis management processes.....3489
BSBOHS607B Advise on application of safe design principles to control OHS risk.....3499
BSBOHS608B Conduct an OHS audit.....3510
BSBOHS609B Evaluate an organisation's OHS performance 3522
BSBPMG401A Apply project scope management techniques.....3532
BSBPMG402A Apply time management techniques.....3538

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BSBPMG403A Apply cost management techniques....3544
BSBPMG404A Apply quality management techniques....3550
BSBPMG405A Apply human resources management approaches....3556
BSBPMG406A Apply communications management techniques....3562
BSBPMG407A Apply risk management techniques....3568
BSBPMG408A Apply contract and procurement procedures....3574
BSBPMG501A Manage application of project integrative processes....3580
BSBPMG502A Manage project scope....3586
BSBPMG503A Manage project time....3592
BSBPMG504A Manage project costs....3598
BSBPMG505A Manage project quality....3604
BSBPMG506A Manage project human resources....3611
BSBPMG507A Manage project communications....3617
BSBPMG508A Manage project risk....3623
BSBPMG509A Manage project procurement....3629
BSBPMG510A Manage projects....3636
BSBPMG601A Direct the integration of projects....3644
BSBPMG602A Direct the scope of a project program....3651
BSBPMG603A Direct time management of a project program....3658
BSBPMG604A Direct cost management of a project program....3665
BSBPMG605A Direct quality management of a project program....3672
BSBPMG606A Direct human resources management of a project program....3678
BSBPMG607A Direct communications management of a project program....3685
BSBPMG608A Direct risk management of a project program....3692
BSBPMG609A Direct procurement and contracting for a project program....3698
BSBPRO301A Recommend products and services....3705
BSBPRO401A Develop product knowledge....3712
BSBPUB401A Develop and apply knowledge of public relations industry....3717
BSBPUB402A Develop public relations campaigns....3724
BSBPUB403A Develop public relations documents....3731
BSBPUB501A Manage the public relations publication process....3739
BSBPUB502A Develop and manage complex public relations campaigns....3746
BSBPUB503A Manage fundraising and sponsorship activities....3754
BSBPUB504A Develop and implement crisis management plans....3761
BSBPUR301B Purchase goods and services....3767
BSBPUR401B Plan purchasing....3773
BSBPUR402B Negotiate contracts....3780
BSBPUR403B Conduct international purchasing....3786
BSBPUR501C Develop, implement and review purchasing strategies....3794
BSBPUR502B Manage supplier relationships....3801
BSBPUR503C Manage international purchasing....3808
BSBPUR504B Manage a supply chain....3815
BSBREL401A Establish networks....3822
BSBREL402A Build client relationships and business networks....3828
BSBREL403A Implement international client relationship strategies....3836
BSBREL501A Build international client relationships....3843
BSBREL502A Build international business networks....3850
BSBREL701A Develop and cultivate collaborative partnerships and relationships....3857
BSBRES401A Analyse and present research information....3870
BSBRES404A Research legal information using primary sources....3878
BSBRES502A Research legal information using secondary sources....3887
BSBRES801A Initiate and lead applied research....3894
BSBRKG301B Control records....3905

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BSBRKG302B Undertake disposal 3914
BSBRKG303B Retrieve information from records 3925
BSBRKG304B Maintain business records....3932
BSBRKG305A Review recordkeeping functions 3939
BSBRKG401B Review the status of a record 3947
BSBRKG402B Provide information from and about records 3955
BSBRKG403C Set up a business or records system for a small business....3962
BSBRKG404A Monitor and maintain records in an online environment....3970
BSBRKG502B Manage and monitor business or records systems....3978
BSBRKG505B Document or reconstruct a business or records system 3989
BSBRKG506A Develop and maintain terminology and classification schemes....3998
BSBRKG601B Define recordkeeping framework....4006
BSBRKG603B Prepare a functional analysis for an organisation 4015
BSBRKG604B Determine security and access rules and procedures 4022
BSBRKG605B Determine records requirements to document a function 4031
BSBRKG606B Design a records retention and disposal schedule....4038
BSBRKG607B Document and monitor the record creating context....4045
BSBRKG608B Plan management of records over time 4051
BSBRSK401A Identify risk and apply risk management processes 4059
BSBRSK501B Manage risk....4066
BSBSLS407A Identify and plan sales prospects....4072
BSBSLS408A Present, secure and support sales solutions....4079
BSBSLS501A Develop a sales plan....4086
BSBSLS502A Lead and manage a sales team 4092
BSBSMB201A Identify suitability for micro business....4098
BSBSMB301A Investigate micro business opportunities....4105
BSBSMB302A Develop a micro business proposal....4112
BSBSMB303A Organise finances for the micro business....4120
BSBSMB304A Determine resource requirements for the micro business....4126
BSBSMB305A Comply with regulatory, taxation and insurance requirements for the micro business 4132
BSBSMB306A Plan a home based business....4138
BSBSMB307A Set up information and communications technology for the micro business4144
BSBSMB401A Establish legal and risk management requirements of small business ...4150
BSBSMB402A Plan small business finances....4158
BSBSMB403A Market the small business 4165
BSBSMB404A Undertake small business planning 4172
BSBSMB405B Monitor and manage small business operations....4181
BSBSMB406A Manage small business finances....4187
BSBSMB407A Manage a small team 4194
BSBSMB408B Manage personal, family, cultural and business obligations....4202
BSBSMB409A Build and maintain relationships with small business stakeholders 4209
BSBSUS201A Participate in environmentally sustainable work practices....4216
BSBSUS301A Implement and monitor environmentally sustainable work practices 4223
BSBSUS501A Develop workplace policy and procedures for sustainability....4233
BSBWOR201A Manage personal stress in the workplace 4242
BSBWOR202A Organise and complete daily work activities....4248
BSBWOR203B Work effectively with others 4254
BSBWOR204A Use business technology 4260
BSBWOR301B Organise personal work priorities and development....4267
BSBWOR302A Work effectively as an off site worker 4274
BSBWOR401A Establish effective workplace relationships....4281
BSBWOR402A Promote team effectiveness 4289

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BSBWOR403A Manage stress in the workplace....4296
BSBWOR404B Develop work priorities....4304
BSBWOR501B Manage personal work priorities and professional development....4311
BSBWOR502B Ensure team effectiveness....4317
BSBWRK401A Develop and implement an organising plan....4324
BSBWRK402A Empower workers....4330
BSBWRK403A Communicate with workers....4337
BSBWRK404A Promote equality of opportunity and fair treatment for all workers....4343
BSBWRK405A Promote union values, principles and policies....4349
BSBWRK406A Participate in the bargaining process....4355
BSBWRK407A Provide advice to union members....4360
BSBWRK408A Undertake negotiations....4366
BSBWRK409A Prepare for and participate in dispute resolution....4372
BSBWRK410A Implement industrial relations procedures....4378
BSBWRK501A Develop, manage and review campaigns and projects....4384
BSBWRK502A Represent the union in key forums....4391
BSBWRK503A Coordinate case preparation and research....4397
BSBWRK504A Advocate and present cases for members....4404
BSBWRK505A Develop, implement and manage union policy....4410
BSBWRK506A Coordinate research and analysis....4416
BSBWRK507A Apply strategic unionism....4423
BSBWRK508A Manage and oversee bargaining....4430
BSBWRK509A Manage industrial relations....4436
BSBWRT301A Write simple documents....4443
BSBWRT401A Write complex documents....4449
BSBWRT501A Write persuasive copy....4456
CHCAD402D Support the interests, rights and needs of clients within duty of care requirements....4463
CHCCS405C Identify and address specific client needs....4470
CHCCS407B Operate referral procedures....4478
CHCCS412D Deliver and develop client services....4483
CHCINF505C Meet statutory and organisation information requirements....4489
CHCORG614A Manage a community sector organisation....4496
CHCPOL403B Undertake research activities....4506
CULMS207C Assist with the presentation of public activities and events....4512
CUFWRT301A Write content for a range of media....4518
CUFWRT302A Write simple stories....4529
CUFWRT401A Edit texts....4537
CUFWRT402A Write extended stories....4546
FNSACC301A Process financial transactions and extract interim reports....4556
FNSACC406A Set up and operate a computerised accounting system....4564
FNSFLT201A Develop and use a personal budget....4572
FNSFLT203A Develop understanding of debt and consumer credit....4580
FNSSAM301A Identify opportunities for cross-selling products and services....4587
FNSSAM402A Implement a sales plan....4593
HLTFA301B Apply first aid....4599
HLTFA402B Apply advanced first aid....4610
HLTFA403A Manage first aid in the workplace....4622
ICAA5056B Prepare disaster recovery and contingency plans....4632
ICAA6149B Implement quality assurance processes for business solutions....4643
ICAICT103A Use, communicate and search securely on the internet....4652
ICAICT203A Operate application software packages....4662
ICAICT209A Interact with ICT clients....4671

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ICASAS204A Record client support requirements 4676
ICASAS305A Provide IT advice to clients 4681
ICAU1133B Send and retrieve information using web browsers and email 4687
ICAU1204B Locate and use relevant on-line information 4696
ICAU2006B Operate computing packages 4703
PSPETHC301B Uphold the values and principles of public service 4711
PSPGOV314A Contribute to conflict management 4720
PSPGOV406B Gather and analyse information 4728
PSPGOV407B Provide a quotation 4736
PSPGOV507A Undertake negotiations 4743
PSPGOV602B Establish and maintain strategic networks 4751
PSPHR616A Manage performance management system 4757
PSPLEGN301B Comply with legislation in the public sector 4765
PSPMNGT614A Facilitate knowledge management 4772
PSPPM402B Manage simple projects 4781
PSPPROC406B Procure goods and services 4791
PSPPROC407A Establish procurement need 4801
PSPPROC408A Develop requests for offers 4809
PSPPROC409A Receive and select offers 4818
PSPPROC410A Administer contracts 4826
PSPPROC406B Procure goods and services 4836
PSPPROC502A Establish contract management arrangements 4846
PSPPROC503B Manage contract performance 4857
PSPPROC504B Finalise contracts 4868
PSPPROC602B Direct the management of contracts 4875
SIRXQUA001A Develop innovative ideas at work 4884
SIRXQUA002A Lead a team to foster innovation 4893

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Modification History

Version	Release Date	Comments

6		**Qualifications:**
		• Revised qualifications:
		  • BSB20207 Certificate II in Customer Contact reviewed; new code is BSB20211
		  • BSB30207 Certificate III in Customer Contact reviewed; new code is BSB30211
		  • BSB40307 Certificate IV in Customer Contact reviewed; new code is BSB40311
		  • BSB50307 Diploma of Customer Contact reviewed; new code is BSB50311
		• Deleted qualification:
		  • BSB60307 Advanced Diploma of Customer Contact.
		
		Units:
		• New units:
		  • BSBCCO203A Conduct customer contact
		  • BSBCCO204A Collect data
		  • BSBCCO205A Prepare for work in a customer contact environment
		  • BSBCCO307A Work effectively in customer contact
		  • BSBCCO308A Conduct outbound customer contact
		  • BSBCCO309A Develop product and service knowledge for customer contact operation
		  • BSBCCO403A Schedule customer contact activity
		  • BSBCCO404A Collect, analyse and record information
		  • BSBCCO405A Survey stakeholders to gather and record information
		  • BSBCCO406A Run a multicentre
		  • BSBCCO407A Administer customer contact technology
		  • BSBCCO502A Establish a multicentre
		  • BSBCCO503A Manage data interrogation
		  • BSBCCO504A Integrate customer contact operations in the organisation
		• Revision to the following units and change to version identifier:

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Version	Release Date	Comments
		• BSBCCO301B Use multiple information systems • BSBCCO302B Deploy customer service field staff • BSBCCO303B Conduct a telemarketing campaign • BSBCCO304C Provide sales solutions to customers • BSBCCO305B Process credit applications • BSBCCO306B Process complex accounts • BSBCCO501B Develop business continuity strategy • BSBCCO601B Optimise customer contact operations • BSBCCO602B Manage customer contact information • BSBCCO603B Design and launch new customer contact facilities • BSBCCO604B Develop and maintain a service level strategy • BSBCCO605B Develop and maintain a customer contact marketing strategy • BSBCCO606B Forecast and plan using customer contact traffic information analysis • BSBCCO607B Manage customer contact centre staffing • BSBCCO608B Manage customer contact operational costs • ISC upgrade to the following units of competency: • BSBCMM301B Process customer complaints • BSBCOM603C Plan and establish compliance management systems • BSBCON601B Develop and maintain business continuity plans • BSBCUS201B Deliver a service to customers • BSBCUS301B Deliver and monitor a service to customers • BSBCUS401B Coordinate implementation of customer service strategies • BSBCUS402B Address customer needs • BSBCUS403B Implement customer service standards • BSBCUS501C Manage quality customer service • BSBITS401B Maintain business technology • BSBPUR501C Develop, implement and review purchasing strategies • BSBPUR503C Manage international purchasing • BSBRKG403C Set up a business or records system for

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Version	Release Date	Comments
		a small business • BSBRSK501B Manage risk • BSBSMB405B Monitor and manage small business operations • BSBWOR203B Work effectively with others • BSBWOR301B Organise personal work priorities and development • Deleted units: • BSBCCO201A Action customer contact • BSBCCO202A Conduct data collection • BSBCCO401A Administer customer contact telecommunications technology • BSBCCO402A Gather, collate and record information • BSBCCO609B Integrate customer contact operations within the organisation • BSBIND101A Work effectively in a contact centre environment. • BSB60407 Advanced Diploma of Management updated to include Contact Centre Operations units of competency as electives. • Basic Contact Centre Operations Skill Set updated with replacement unit for now-deleted BSBIND101A. Skill set considered equivalent. • 2 skill sets added: • Innovation Practice • Innovation Leadership
5	4 February 2011	**Qualifications:** • BSB41907 Certificate IV in Business (Governance) reviewed; new code is BSB41910 • BSB50707 Diploma of Business (Governance) reviewed; new code is BSB50710 • BSB10107 Certificate I in Business – addition of unit BSBITU202A Create and use spreadsheets to elective bank **Units:** • New Units • BSBATSIC412A Maintain and protect cultural values in the organisation • BSBATSIC511A Plan and conduct a community

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Version	Release Date	Comments
		meeting • BSBATSIL411A Undertake the roles and responsibilities of a board member • BSBATSIL412A Participate effectively as a board member • BSBATSIL413A Review and apply the constitution • BSBATSIL510A Appoint and work with a manager • BSBATSIL511A Lead the organisation's strategic planning cycle • BSBATSIL512A Be a leader in the community • BSBATSIM416A Oversee organisational planning • BSBATSIM417A Implement organisational plans • BSBATSIM418A Oversee financial management • BSBATSIM419A Contribute to the development and implementation of organisational policies • BSBATSIM420A Oversee asset management • BSBATSIM421A Support a positive and culturally appropriate workplace culture • BSBATSIM514A Recruit and induct staff • Amendments to the following units and change to version identifier: • BSBATSIC411B Communicate with the community • BSBATSIL408B Manage a board meeting • BSBATSIL503B Manage conflict • BSBATSIM414B Oversee the organisation's annual budget • BSBATSIM505B Control organisation finances • BSBATSIM506B Develop employment policies • BSBATSIM511B Develop enterprise opportunities • BSBATSIW416B Obtain and mange consultancy services • BSBATSIW417B Select and utilise technology • BSBATSIW514B Represent your organisation • BSBATSIW515B Secure funding • A range of units deleted (refer to 'List of Units Deleted from Previous Training Package/Versions') **Other:**

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Version	Release Date	Comments
		• Typographic corrections in a number of qualifications and units not affecting outcomes • Imported unit codes updated where required

4	3 February 2011	**Qualifications:**
		• BSB30107 Certificate III in Business reviewed: new code is BSB30110
		• BSB40607 Certificate IV in Business Sales reviewed; new code is BSB40610
		• BSB60107 Advanced Diploma of Advertising reviewed; new code is BSB60110
		• The following qualifications have been reviewed, there is no change to the core requirement or the code of the qualification:
		  • BSB20207 Certificate II in Customer Contact
		  • BSB30207 Certificate III in Customer Contact
		  • BSB40107 Certificate IV in Advertising
		  • BSB41307 Certificate IV in Marketing
		  • BSB50107 Diploma of Advertising
		  • BSB50207 Diploma of Business
		  • BSB50607 Diploma of Human Resources Management
		  • BSB50807 Diploma of International Business
		  • BSB51107 Diploma of Management
		  • BSB51207 Diploma of Marketing
		  • BSB60207 Advanced Diploma of Business
		  • BSB60507 Advanced Diploma of Marketing
		• The following qualifications have been deleted:
		  • BSB31207 Certificate III in Frontline Management
		  • BSB50907 Diploma of International Education Services
		  • BSB70108 Vocational Graduate Certificate in Management (Learning)
		  • BSB70207 Vocational Graduate Certificate in International Education Services
		  • BSB80108 Vocational Graduate Diploma of Management (Learning
		Units:
		• New units:
		  • BSBADV408A Review advertising media options

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Version	Release Date	Comments
		• BSBDIV501A Manage diversity in the workplace • BSBHRM511A Manage expatriate staff • BSBMGT406A Plan and monitor continuous improvement • BSBMKG518A Plan and implement services marketing • BSBMKG519A Plan and implement business-to-business marketing • BSBMKG520A Manage compliance within the marketing legislative framework • BSBMKG521A Plan and implement sponsorship and event marketing • BSBMKG522A Plan measurement of marketing effectiveness • BSBMKG523A Design and develop an integrated marketing communication plan • BSBMKG611A Manage measurement of marketing effectiveness • BSBSLS407A Identify and plan sales prospects • BSBSLS408A Present, secure and support sales solutions • Corrections to the following units and change to version identifier: • BSBHRM503A Manage performance management systems • BSBHRM505A Manage remuneration and employee benefits • BSBHRM602A Manage human resources strategic planning • BSBINN601A Manage organisational change • BSBMGT516B Facilitate continuous improvement • BSBMGT608B Manage innovation and continuous improvement • BSBMKG414A Undertake marketing activities • BSBMKG510A Plan e-marketing communications • A range of units deleted (refer to ‘List of Units Deleted from Previous Training Package/Versions’ later in this document) • 2 skill sets added: • Aspiring Supervisor • Managing Innovation

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Version	Release Date	Comments

3	August 2010	**Qualifications:**
		• BSB41207 Certificate IV in Legal Services qualification reviewed; new code is BSB40110
		• BSB51007 Diploma of Legal Services qualification reviewed; new code is BSB50110
		• All qualifications amended to comply with the NQC flexibility rules, with the exception of:
		  • BSB41507 Certificate IV in Project Management
		  • BSB51407 Diploma of Project Management
		  • BSB60707 Advanced Diploma of Project Management
		Units:
		• New units:
		  • BSBCMM402A Implement effective communication strategies
		  • BSBCMM501A Develop and nurture relationships
		  • BSBCOM406A Conduct work within a compliance framework
		  • BSBLED503A Maintain and enhance professional practice
		  • BSBLEG413A Identify and apply the legal framework
		  • BSBLEG414A Establish and maintain a file in legal services
		  • BSBLEG415A Apply the principles of contract law
		  • BSBLEG416A Apply the principles of the law of torts
		  • BSBLEG417A Apply the principles of evidence law
		  • BSBLEG418A Produce complex legal documents
		  • BSBLEG510A Apply legal principles in family law matters
		  • BSBLEG511A Apply legal principles in criminal law matters
		  • BSBLEG512A Apply legal principles in property law matters
		  • BSBLEG513A Apply legal principles in corporation law matters
		  • BSBLEG514A Assist with civil procedure
		  • BSBLEG515A Apply legal principles in wills and probate matters
		  • BSBRES404A Research legal information using primary sources
		  • BSBRES502A Research legal information using

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Version	Release Date	Comments
		secondary sources • A range of units deleted (refer to 'List of Units Deleted from Previous Training Package/Versions') • Corrections to the following units and change to version identifier: • BSBCCO304A – Evidence Guide modified to better reflect the required outcomes • BSBCUS501A – PC2.2 and 2.3 reworded and made clearer • BSBITU302A – Code should have changed from an A to a B in September 2008 when changes were made to the Evidence Guide • BSALF401A - Required knowledge amended • BSBMGT516A – Critical aspects of assessment re-worded • BSBFLM312B – Critical aspects of assessment re-worded to remove ambiguities • BSBWOR404A – PC2.1; 3.2 and 3.4 reworded and made clearer • BSBWOR501A – Required knowledge amended • BSBWOR502A – Required knowledge amended • BSBOHS406B – Change to Required Skills and Critical aspects of assessment • BSBOHS505B – Required knowledge amended. **Mapping:** • Correction of mapping for units • Deleted unit table amended to include correct advice i.e. BSBCMN402A Develop work priorities – deleted and replaced by BSBWOR404A Develop work priorities
2	April 2009	**Addition of two new Competency Fields:** Intellectual Property: • Addition of 8 new units on intellectual property: • BSBIPR301A Comply with organisational requirements for protection and use of intellectual property • BSBIPR401A Use and respect copyright • BSBIPR402A Protect and use new inventions and innovations • BSBIPR403A Protect and use brands and business identity

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Version	Release Date	Comments
		• BSBIPR404A Protect and use innovative designs • BSBIPR405A Protect and use intangible assets in small business • BSBIPR501A Manage intellectual property to protect and grow business • BSBIPR601A Develop and implement strategies for intellectual property management • Revisions to 11 qualifications to include intellectual property units as electives: • BSB30107 Certificate III in Business • BSB30407 Certificate III in Business Administration • BSB30307 Certificate III in Micro Business Operations • BSB40207 Certificate IV in Business • BSB40707 Certificate IV in Franchising • BSB40407 Certificate IV in Small Business Management • BSB50207 Diploma of Business • BSB50507 Diploma of Franchising • BSB51107 Diploma of Management • BSB60207 Advanced Diploma of Business • BSB60407 Advanced Diploma of Management • Addition of 6 skill sets on intellectual property: • Intellectual Property Strategic Management Skill Set • Copyright Skill Set • Trade Mark Skill Set • Patent Skill Set • Design Protection Skill Set • Small Business Intellectual Property Skill Set Continuity: • Addition of 3 new units on business continuity: • BSBCON401A Work effectively in a business continuity context • BSBCON601A Develop and maintain business continuity plans • BSBCON701A Establish and review the business continuity management framework and strategies • Revisions to 3 qualifications to include business

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		continuity units as electives:
		• BSB40207 Certificate IV in Business
		• BSB50207 Diploma of Business
		• BSB60207 Advanced Diploma of Business
		
		Units:
		• Corrections to the following units:
		  • BSBCCO304A – modification of Range Statement to better reflect the required outcomes; correction of ICA unit code in 'Guidance information for assessment'
		  • BSBCUS402A – correction of first point in Critical Aspects for Assessment
		  • BSBITU301A – modification of Performance Criteria 1.1
		  • BSBOHS201A – modification of Range Statement to better reflect required outcomes
		  • BSBWOR401A and BSBWOR502A – Competency Field corrected to be 'Industry Capability - Workplace Effectiveness'
		  • BSBWOR404A – modification of Performance Criteria 2.3
		• Update of imported units
		
		Qualifications:
		• Corrections to the following qualifications:
		  • BSB30207 – second paragraph 'BSB07 Business Services Training Package' included to match packaging rules of all other BSB07 qualifications
		  • BSB30707 – example of appropriate unit for 'Health and Safety Assistant' in the section on 'Selecting Elective Units for Different Outcomes' amended to meet packaging requirements
		  • BSB50207 – statement regarding units from other Training Packages removed
		  • BSB51107 – BSBCUS501A, BSBFIM501A, BSBLED501A, BSBMGT502A and BSBMGT516A removed from the elective bank of units as they duplicated core units

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Version	Release Date	Comments

		Skill Sets:
		• Correction of unit code for 'Oversee business planning' in Small Business Indigenous Corporate Governance Skill Set
		• Addition of two new Skill Sets:
		  • Basic Contact Centre Operations Skill Set
		  • Design Fundamentals Skill Set

1.1	September 2008	• Change in code and title of BSB70107 Vocational Graduate Certificate in Organisational Learning and Capability Development
		to
		BSB70108 Vocational Graduate Certificate in Management (Learning)
		• Change in code and title of BSB80107 Vocational Graduate Diploma of Organisational Learning and Capability Development
		to
		BSB80108 Vocational Graduate Diploma of Management (Learning)
		• Minor change to BSBITU302B Critical aspects for assessment:
		Removal of second dot point as it does not support the required unit outcomes
		• Correction of mapping for qualifications:
		  • Titles and codes for BSB70107 and BSB80107
		  • BSB60407 Advanced Diploma of Management
		  • BSB60907 Advanced Diploma of Management (Human Resources)
		• Correction of mapping for units:
		  • BSBOHS509A Ensure a safe workplace
		  • BSBADM101A Use business equipment and resources
		  • BSBADM409A Coordinate business resources
		  • BSBCCO305A Process credit applications
		  • BSBCCO602A Manage customer contact information
		  • BSBCCO606A Forecast and plan using customer contact traffic information analysis
		  • BSBCCO609A Integrate customer contact operations within the organisation
		  • BSBFIM501A Manage budgets and financial plans
		  • BSBHRM501A Manage human resources services
		  • BSBHRM502A Manage human resources management

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		information systems • BSBHRM602A Manage human resources strategic planning • BSBINM501A Manage an information or knowledge management system • BSBINN601A Manage organisational change • BSBITB501A Establish and maintain a workgroup computer network • BSBITU202A Create and use spreadsheets • BSBMED301B Interpret and apply medical terminology appropriately • BSBMGT405A Provide personal leadership • BSBMGT615A Contribute to organisation development • BSBMGT618A Develop a contact centre business plan • BSBMKG514A Implement and monitor marketing activities • BSBMKG610A Develop, implement and monitor a marketing campaign • BSBOHS201A Participate in OHS processes • BSBOHS509A Ensure a safe workplace • BSBPMG401A Apply project scope management techniques • BSBPMG408A Apply contract and procurement procedures • BSBPMG601A Direct the integration of projects • BSBPMG602A Direct the scope of a project program • BSBPMG603A Direct time management of a project program • BSBPMG604A Direct cost management of a project program • BSBPMG605A Direct quality management of a project program • BSBPMG606A Direct human resources management of a project program • BSBPMG607A Direct communications management of a project program • BSBPMG608A Direct risk management of a project program • BSBPMG609A Direct procurement and contracting for a project program

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Version	Release Date	Comments
		• BSBREL401A Establish networks • BSBREL402A Build client relationships and business networks • BSBWOR401A Establish effective workplace relationships • BSBWRK402A Empower workers • BSBWRK404A Promote equality of opportunity and fair treatment for all workers • BSBWRK405A Promote union values, principles and policies • BSBWRK509A Manage industrial relations • Correction of titles in deleted unit list: • BSBMED402A Control stocks and supplies • BSBEBUS302A Use and maintain electronic mail system • BSBMED202A Follow OHS policies and procedures in a medical office • BSBCMN109A Follow environmental work practices
1	December 2007	Primary release

BSB07 Business Services Training Package

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Published by: Innovation & Business Skills Australia Ltd
Level 11, 176 Wellington Parade
East Melbourne VIC 3002
Phone: +61 3 9815 7000 Fax: +61 3 9815 7001
www.ibsa.org.au email *reception@ibsa.org.au*

Print Version Number: 6.0

Release Date: November 2011

Review Date: 23 June 2014

Training Package Details

Training Package Details

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Training Package Code:	BSB07
Training Package Name:	Business Services Training Package
First Published:	January 2008
AEShareNet Code:	FfE
Print Version Number:	6.0
Endorsed Date:	26 October 2011
Copyright Year:	2010
Training Package Review Date:	31 December 2010
ISC Name:	Innovation and Business Skills Australia
ISC Website URL:	www.ibsa.org.au

Training Package Volume Number	**Training Package Volume Name**
1 of 2	BSB07 Business Services Training Package Introduction, Qualification Guide and Assessment Guidelines
2 of 2	BSB07 Business Services Training Package Units of Competency

Training Package Volume Number	**Training Package Volume Statement**
1 of 2	This is Volume 1 of 2 volumes. It is to be read in conjunction with Volume 2.
2 of 2	This is Volume 2 of 2 volumes. It is to be read in conjunction with Volume 1.

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Training Package Volume Number	Training Package Volume Description
1 of 2	This document is Volume 1 of the BSB07 Business Services Training Package endorsed components. It provides the introduction to the Training Package, including the Introduction, Qualification Guide and Assessment Guidelines. It should not be used in isolation; users will need to ensure they have the relevant volume for the particular industry sector containing the endorsed units of competency.
2 of 2	This document is Volume 2 of the BSB07 Business Services Training Package endorsed components. It includes all of the units of competency in alpha-numeric code order.

Preliminary Information

Important Note to Users

Training Packages are not static documents; they are amended periodically to reflect the latest industry practices and are version controlled. It is essential that the latest version is always used.

Check the version number before commencing training or assessment

This Training Package is Version - check whether this is the latest version by going to the National Training Information Service (www.ntis.gov.au) and locating information about the Training Package. Alternatively, contact Innovation and Business Industry Skills Council at http://www.ibsa.org.au to confirm the latest version number.

Explanation of version number conventions

The primary release Training Package is Version 1. When changes are made to a Training Package, sometimes the version number is changed and sometimes it is not, depending on the extent of the change. When a Training Package is reviewed it is considered to be a new Training Package for the purposes of version control, and is Version 1. Do not confuse the version number with the Training Packages national code (which remains the same during its period of endorsement).

Overview

What is a Training Package?

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A Training Package is an integrated set of nationally endorsed competency standards, assessment guidelines and Australian Qualifications Framework (AQF) qualifications for a specific industry, industry sector or enterprise.

Each Training Package:

- provides a consistent and reliable set of components for training, recognising and assessing peoples skills, and may also have optional support materials
- enables nationally recognised qualifications to be awarded through direct assessment of workplace competencies
- encourages the development and delivery of flexible training which suits individual and industry requirements
- encourages learning and assessment in a work-related environment which leads to verifiable workplace outcomes.

How do Training Packages fit within the National Skills Framework?

The National Skills Framework applies nationally, is endorsed by the Ministerial Council for Vocational and Technical Education, and comprises the Australian Quality Training Framework 2010 (AQTF 2010), and Training Packages endorsed by the National Quality Council (NQC).

How are Training Packages developed?

Training Packages are developed by Industry Skills Councils or enterprises to meet the identified training needs of specific industries or industry sectors. To gain national endorsement of Training Packages, developers must provide evidence of extensive research, consultation and support within the industry area or enterprise.

How do Training Packages encourage flexibility?

Training Packages describe the skills and knowledge needed to perform effectively in the workplace without prescribing how people should be trained. Training Packages acknowledge that people can achieve vocational competency in many ways by emphasising what the learner can do, not how or where they learned to do it. For example, some experienced workers might be able to demonstrate competency against the units of competency, and even gain a qualification, without completing a formal training program.

With Training Packages, assessment and training may be conducted at the workplace,

off-the-job, at a training organisation, during regular work, or through work experience, work placement, work simulation or any combination of these.

Who can deliver and assess using Training Packages?

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Training and assessment using Training Packages must be conducted by a Registered Training Organisation (RTO) that has the qualifications or specific units of competency on its scope of registration, or that works in partnership with another RTO, as specified in the AQTF2010.

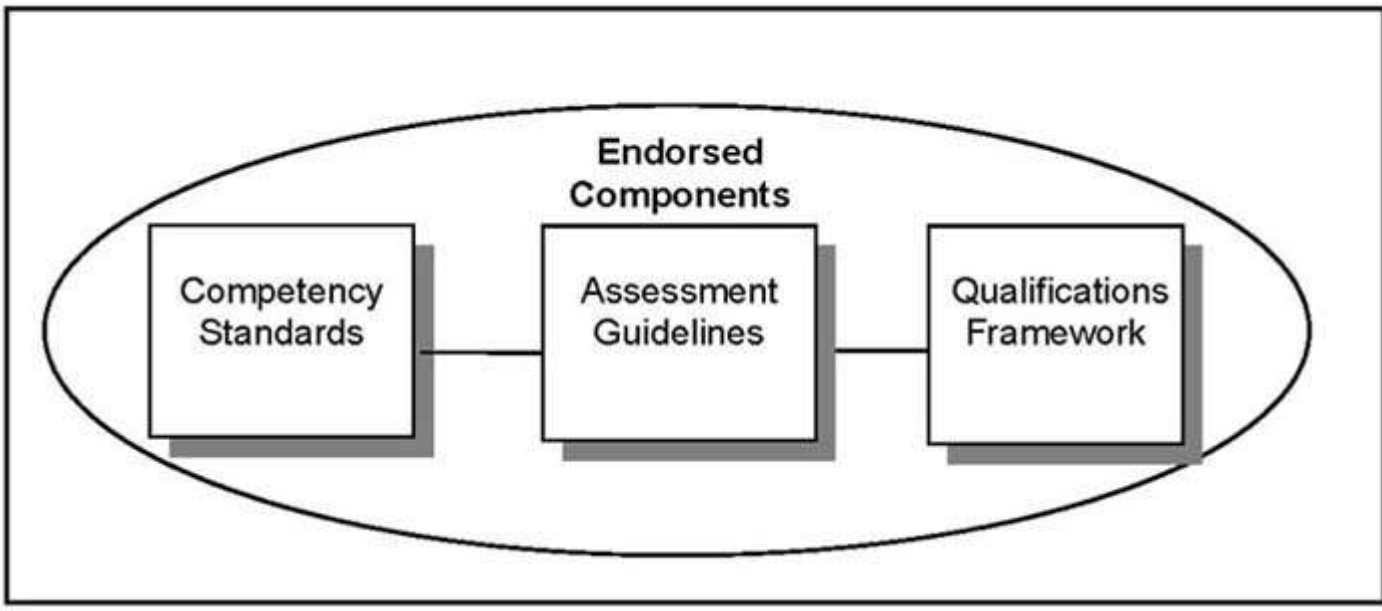
Training Package Components

Training Packages are made up of mandatory components endorsed by the NQC, and optional support materials.

Training Package Endorsed Components

Training Package Endorsed Components

The nationally endorsed components include the Competency Standards, Assessment Guidelines and Qualifications Framework. These form the basis of training and assessment in the Training Package and, as such, they must be used.



Competency Standards

Each unit of competency identifies a discrete workplace requirement and includes the knowledge and skills that underpin competency as well as language, literacy and numeracy; and occupational health and safety requirements. The units of competency must be adhered to in training and assessment to ensure consistency of outcomes.

Assessment Guidelines

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The Assessment Guidelines provide an industry framework to ensure all assessments meet industry needs and nationally agreed standards as expressed in the Training Package and the AQTF 2010. The Assessment Guidelines must be followed to ensure the integrity of assessment leading to nationally recognised qualifications.

Qualifications Framework

Each Training Package provides details of those units of competency that must be achieved

to award AQF qualifications. The rules around which units of competency can be combined to make up a valid AQF qualification in the Training Package are referred to as the "packaging rules". The packaging rules must be followed to ensure the integrity of nationally recognised qualifications issued.

Training Package Support Materials

The endorsed components of Training Packages are complemented and supported by optional support materials that provide for choice in the design of training and assessment to meet the needs of industry and learners.

Training Package support materials can relate to single or multiple units of competency, an industry sector, a qualification or the whole Training Package. They tend to fall into one or more of the categories illustrated below.

Training Package support materials are produced "by a range of stakeholders such as RTOs, individual trainers and assessors, private and commercial developers and Government agencies.

Where such materials have been quality assured through a process of "noting" by the NQC, they display the following official logo. Noted support materials are listed on the National Training Information Service (NTIS), together with a detailed description and information on the type of product and its availability < www.ntis.gov.au>.

It is not compulsory to submit support materials for noting; any resources that meet the requirements of the Training Package can be used.

Training Package, Qualification and Unit of Competency Codes

There are agreed conventions for the national codes used for Training Packages and their components. Always use the correct codes, exactly as they appear in the Training Package, **and with the code always before the title**.

Training Package Codes

Each Training Package has a unique five-character national code assigned when the Training Package is endorsed, for example BSB07. The first three characters are letters identifying the Training Package industry coverage and the last two characters are numbers identifying the year of endorsement.

Qualification Codes

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Within each Training Package, each qualification has a unique eight-character code, for example BSB10107. Qualification codes are developed as follows:

- the first three letters identify the Training Package;
- the first number identifies the qualification level (noting that, in the qualification titles themselves, arabic numbers are **not** used);
- the next two numbers identify the position in the sequence of the qualification at that level; and
- the last two numbers identify the year in which the qualification was endorsed. (Where qualifications are added after the initial Training Package endorsement, the last two numbers may differ from other Training Package qualifications as they identify the year in which those particular qualifications were endorsed.)

Unit of Competency Codes

Within each Training Package, each unit of competency has a unique code. Unit of competency codes are assigned when the Training Package is endorsed, or when new units of competency are added to an existing endorsed Training Package. Unit codes are developed as follows:

- a typical code is made up of 12 characters, normally a mixture of uppercase letters and numbers, as in BSBADM101A;
- the first three characters signify the Training Package - BSB07 - in the above example and up to eight characters, relating to an industry sector, function or skill area, follow;
- the last character is always a letter and identifies the unit of competency version. An "A" at the end of the code indicates that this is the original unit of competency. "B", or another incremented version identifier means that minor changes have been made. Typically this would mean that wording has changed in the range statement or evidence guide, providing clearer intent; and
- where changes are made that alter the outcome, a new code is assigned and the title is changed.

Training Package, Qualification and Unit of Competency Titles

There are agreed conventions for titling Training Packages and their components. Always use the correct titles, exactly as they appear in the Training Package, and with the code always placed before the title.

Training Package Titles

The title of each endorsed Training Package is unique and relates the Training Packages broad industry coverage.

Qualification Titles

The title of each endorsed Training Package qualification is unique. Qualification titles use the following sequence:

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- first, the qualification is identified as either Certificate I, Certificate II, Certificate III, Certificate IV, Diploma, Advanced Diploma, Vocational Graduate Certificate, or Vocational Graduate Diploma;
- this is followed by the words "in" for Certificates I to IV, and "of" for Diploma, Advanced Diploma, Vocational Graduate Certificate and Vocational Graduate Diploma;
- then, the industry descriptor, for example Telecommunications; and
- then, if applicable, the occupational or functional stream in brackets, for example (Computer Systems).

For example:

- BSB10107 Certificate I in Business

Unit of Competency Titles

Each unit of competency title is unique. Unit of competency titles describe the competency outcome concisely, and are written in sentence case.

For example:

- BSBADM101A Use business equipment and resources

History

In December 2007 the primary version of BSB07 was endorsed and released in January 2008, it included all the fields and domains in BSB01, as well as new qualifications in the following areas:

- micro business operations
- customer contact
- administration (education)
- administration (international education)
- international education services
- management (learning).

Version 1.1 of BSB07 was released in September 2008 and included a range of ISC upgrades which were corrections to qualifications and units of competency. The major change was the change of code and title of BSB70107 Vocational Graduate Certificate in Organisational Learning and Capability Development and BSB80107 Vocational Graduate Diploma of Organisational Learning and Capability Development.

Version 2 included new units of competency in business continuity and intellectual property. A range of qualifications was amended to include intellectual property units; and two skills sets were also included, along with a number of ISC upgrades.

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Version 3 included a number of ISC upgrades and the revised Certificate IV in Legal Services and Diploma of Legal Services qualifications. The qualification rules in the majority of qualifications were revised to comply with the recent NQC flexibility rules. This revision did not change the outcomes of the qualifications.

Version 4 included the revised Certificate III in Business, Certificate IV in Business Sales, and Advanced Diploma of Advertising. In addition twelve qualifications were amended to include additional or amended elective units and five qualifications were deleted, including the Certificate III in Frontline Management.

Version 5 included the revised Certificate IV in Business (Governance) and the Diploma of Business (Governance); the new codes are BSB41910 and BSB50710 respectively. The review of these qualifications indicated that there was a strong interest in and need for training in the area of organisational governance and that these two qualifications best met the training needs of people involved with Aboriginal and Torres Strait Islander organisations.

Version 6 includes the deletion of BSB60307 Advanced Diploma of Customer Contact and the revision of four customer contact qualifications: Certificate II in Customer Contact, Certificate III in Customer Contact, Certificate IV in Customer Contact and Diploma of Customer Contact. The new codes for the qualifications are BSB20211, BSB30211, BSB40311 and BSB50311. The qualifications were reviewed to address industry requirements and 13 new units of competency were developed.

Qualifications Framework

The Australian Qualifications Framework

What is the Australian Qualifications Framework?

A brief overview of the Australian Qualifications Framework (AQF) follows. For a full explanation of the AQF, see the AQF Implementation Handbook. http://www.aqf.edu.au/Portals/0/Documents/Handbook/AQF_Handbook_07.pdf The AQF provides a comprehensive, nationally consistent framework for all qualifications in post-compulsory education and training in Australia. In the vocational education and training (VET) sector it assists national consistency for all trainees, learners, employers and providers by enabling national recognition of qualifications and Statements of Attainment.

Training Package qualifications in the VET sector must comply with the titles and guidelines of the AQF. Endorsed Training Packages provide a unique title for each AQF qualification which must always be reproduced accurately.

Qualifications

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Training Packages can incorporate the following eight AQF qualifications.

- Certificate I in ...
- Certificate II in ...
- Certificate III in ...
- Certificate IV in ...
- Diploma of ...
- Advanced Diploma of ...
- Vocational Graduate Certificate of ...
- Vocational Graduate Diploma of ...

Graduate Certificates and Graduate Diplomas can also be awarded in the vocational education and training sector under certain conditions see the *AQF Implementation Handbook* for details.

On completion of the requirements defined in the Training Package, a Registered Training Organisation (RTO) may issue a nationally recognised AQF qualification. Issuance of AQF qualifications must comply with the advice provided in the *AQF Implementation Handbook* and the AQTF 2010 *Essential Standards for Initial and Continuing Registration.*

Statement of Attainment

A Statement of Attainment is issued by a Registered Training Organisation when an individual has completed one or more units of competency from nationally recognised qualification(s)/courses(s). Issuance of Statements of Attainment must comply with the advice provided in the current *AQF Implementation Handbook* and the AQTF 2010 *Essential Standards for Initial and Continuing Registration.*.

Under the AQTF 2010, RTOs must recognise the achievement of competencies as recorded on a qualification testamur or Statement of Attainment issued by other RTOs. Given this, recognised competencies can progressively build towards a full AQF qualification.

AQF Guidelines and Learning Outcomes

The *AQF Implementation Handbook* provides a comprehensive guideline for each AQF qualification. A summary of the learning outcome characteristics and their distinguishing features for each VET related AQF qualification is provided below.

Certificate I

Characteristics of Learning Outcomes

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Breadth, depth and complexity of knowledge and skills would prepare a person to perform a defined range of activities most of which may be routine and predictable.

Applications may include a variety of employment related skills including preparatory access and participation skills, broad-based induction skills and/or specific workplace skills. They may also include participation in a team or work group.

Distinguishing Features of Learning Outcomes

Do the competencies enable an individual with this qualification to:

- demonstrate knowledge by recall in a narrow range of areas;
- demonstrate basic practical skills, such as the use of relevant tools;
- perform a sequence of routine tasks given clear direction
- receive and pass on messages/information.

Certificate II

Characteristics of Learning Outcomes

Breadth, depth and complexity of knowledge and skills would prepare a person to perform in a range of varied activities or knowledge application where there is a clearly defined range of contexts in which the choice of actions required is usually clear and there is limited complexity in the range of operations to be applied.

Performance of a prescribed range of functions involving known routines and procedures and some accountability for the quality of outcomes.

Applications may include some complex or non-routine activities involving individual responsibility or autonomy and/or collaboration with others as part of a group or team.

Distinguishing Features of Learning Outcomes

Do the competencies enable an individual with this qualification to:

- demonstrate basic operational knowledge in a moderate range of areas;
- apply a defined range of skills;
- apply known solutions to a limited range of predictable problems;
- perform a range of tasks where choice between a limited range of options is required;
- assess and record information from varied sources;
- take limited responsibility for own outputs in work and learning.

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Certificate III

Characteristics of Learning Outcomes

Breadth, depth and complexity of knowledge and competencies would cover selecting, adapting and transferring skills and knowledge to new environments and providing technical advice and some leadership in resolution of specified problems. This would be applied cross a range of roles in a variety of contexts with some complexity in the extent and choice of options available.

Performance of a defined range of skilled operations, usually within a range of broader related activities involving known routines, methods and procedures, where some discretion and judgement is required in the section of equipment, services or contingency measures and within known time constraints.

Applications may involve some responsibility for others. Participation in teams including group or team co-ordination may be involved.

Distinguishing Features of Learning Outcomes

Do the competencies enable an individual with this qualification to:

- demonstrate some relevant theoretical knowledge
- apply a range of well-developed skills
- apply known solutions to a variety of predictable problems
- perform processes that require a range of well-developed skills where some discretion and judgement is required
- interpret available information, using discretion and judgement
- take responsibility for own outputs in work and learning
- take limited responsibility for the output of others

Certificate IV

Characteristics of Learning Outcomes

Breadth, depth and complexity of knowledge and competencies would cover a broad range of varied activities or application in a wider variety of contexts most of which are complex and non-routine. Leadership and guidance are involved when organising activities of self and others as well as contributing to technical solutions of a non-routine or contingency nature.

Performance of a broad range of skilled applications including the requirement to evaluate and analyse current practices, develop new criteria and procedures for performing current practices and provision of some leadership and guidance to others in the application and planning of the skills. Applications involve responsibility for, and limited organisation of, others.

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Distinguishing Features of Learning Outcomes

Do the competencies enable an individual with this qualification to:

- demonstrate understanding of a broad knowledge base incorporating some theoretical concepts
- apply solutions to a defined range of unpredictable problems
- identify and apply skill and knowledge areas to a wide variety of contexts, with depth in some areas
- identify, analyse and evaluate information from a variety of sources
- take responsibility for own outputs in relation to specified quality standards
- take limited responsibility for the quantity and quality of the output of others.

Diploma

Characteristics of Learning Outcomes

Breadth, depth and complexity covering planning and initiation of alternative approaches to skills or knowledge applications across a broad range of technical and/or management requirements, evaluation and co-ordination.

The self directed application of knowledge and skills, with substantial depth in some areas where judgment is required in planning and selecting appropriate equipment, services and techniques for self and others.

Applications involve participation in development of strategic initiatives as well as personal responsibility and autonomy in performing complex technical operations or organising others. It may include participation in teams including teams concerned with planning and evaluation functions. Group or team co-ordination may be involved.

The degree of emphasis on breadth as against depth of knowledge and skills may vary between qualifications granted at this level.

Distinguishing Features of Learning Outcomes

Do the competencies or learning outcomes enable an individual with this qualification to:

- demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas
- analyse and plan approaches to technical problems or management requirements
- transfer and apply theoretical concepts and/or technical or creative skills to a range of situations
- evaluate information, using it to forecast for planning or research purposes

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- take responsibility for own outputs in relation to broad quantity and quality parameters
- take some responsibility for the achievement of group outcomes.

Advanced Diploma

Characteristics of Learning Outcomes

Breadth, depth and complexity involving analysis, design, planning, execution and evaluation across a range of technical and/or management functions including development of new criteria or applications or knowledge or procedures.

The application of a significant range of fundamental principles and complex techniques across a wide and often unpredictable variety of contexts in relation to either varied or highly specific functions. Contribution to the development of a broad plan, budget or strategy is involved and accountability and responsibility for self and others in achieving the outcomes is involved.

Applications involve significant judgement in planning, design, technical or leadership/guidance functions related to products, services, operations or procedures.

The degree of emphasis on breadth as against depth of knowledge and skills may vary between qualifications granted at this level.

Distinguishing Features of Learning Outcomes

Do the competencies or learning outcomes enable an individual with this qualification to:

- demonstrate understanding of specialised knowledge with depth in some areas
- analyse, diagnose, design and execute judgements across a broad range of technical or management functions
- generate ideas through the analysis of information and concepts at an abstract level
- demonstrate a command of wide-ranging, highly specialised technical, creative or conceptual skills
- demonstrate accountability for personal outputs within broad parameters
- demonstrate accountability for personal and group outcomes within broad parameters.

Vocational Graduate Certificate

Characteristics of competencies or learning outcomes

- The self-directed development and achievement of broad and specialised areas of knowledge and skills, building on prior knowledge and skills.

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- Substantial breadth and complexity involving the initiation, analysis, design, planning, execution and evaluation of technical and management functions in highly varied and highly specialised contexts.
- Applications involve making significant, high-level, independent judgements in major broad or planning, design, operational, technical and management functions in highly varied and specialised contexts. They may include responsibility and broad-ranging accountability for the structure, management and output of the work or functions of others.
- The degree of emphasis on breadth, as opposed to depth, of knowledge and skills may vary between qualifications granted at this level.

Distinguishing features of learning outcomes

- Demonstrate the self-directed development and achievement of broad and specialised areas of knowledge and skills, building on prior knowledge and skills.
- Initiate, analyse, design, plan, execute and evaluate major broad or technical and management functions in highly varied and highly specialised contexts.
- Generate and evaluate ideas through the analysis of information and concepts at an abstract level.
- Demonstrate a command of wide-ranging, highly specialised technical, creative or conceptual skills in complex contexts.
- Demonstrate responsibility and broad-ranging accountability for the structure, management and output of the work or functions of others.

Vocational Graduate Diploma

Characteristics of competencies or learning outcomes

- The self-directed development and achievement of broad and specialised areas of knowledge and skills, building on prior knowledge and skills.
- Substantial breadth, depth and complexity involving the initiation, analysis, design, planning, execution and evaluation of major functions, both broad and highly specialised, in highly varied and highly specialised contexts.
- Further specialisation within a systematic and coherent body of knowledge.
- Applications involve making high-level, fully independent, complex judgements in broad planning, design, operational, technical and management functions in highly varied and highly specialised contexts. They may include full responsibility and accountability for

all aspects of work and functions of others, including planning, budgeting and strategy development.

- The degree of emphasis on breadth, as opposed to depth, of knowledge and skills may vary between qualifications granted at this level.

Distinguishing features of learning outcomes

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- Demonstrate the self-directed development and achievement of broad and highly specialised areas of knowledge and skills, building on prior knowledge and skills.
- Initiate, analyse, design, plan, execute and evaluate major functions, both broad and within highly varied and highly specialised contexts.
- Generate and evaluate complex ideas through the analysis of information and concepts at an abstract level.
- Demonstrate an expert command of wide-ranging, highly specialised, technical, creative or conceptual skills in complex and highly specialised or varied contexts.
- Demonstrate full responsibility and accountability for personal outputs.
- Demonstrate full responsibility and accountability for all aspects of the work or functions of others, including planning, budgeting and strategy.

Qualification Pathways

The BSB07 Business Services Training Package does not mandate particular pathways to the achievement of qualifications. It is the prerogative of RTOs to use the qualifications rules to provide the best learning programs and sequences to meet the needs of candidates and business customers.Candidates may undertake a qualification through a number of entry points demonstrating the potential to undertake vocational education and training at a particular AQF level. Examples are:

- completing a specific lower level qualification from the BSB07 Business Services Training Package or other relevant qualification at the same AQF level **or**
- having partially completed a specific lower level qualification **or**
- having vocational experience and no lower level qualification.

List of AQF Qualifications in BSB07 Version 6

Code	Title
BSB10107	Certificate I in Business
BSB20107	Certificate II in Business
BSB20211	Certificate II in Customer Contact
BSB30110	Certificate III in Business
BSB30211	Certificate III in Customer Contact
BSB30307	Certificate III in Micro Business Operations
BSB30407	Certificate III in Business Administration
BSB30507	Certificate III in Business Administration (International Education)

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Code	Title
BSB30607	Certificate III in International Trade
BSB30707	Certificate III in Occupational Health and Safety
BSB30807	Certificate III in Recordkeeping
BSB30907	Certificate III in Business Administration (Education)
BSB31007	Certificate III in Business Administration (Legal)
BSB31107	Certificate III in Business Administration (Medical)
BSB40107	Certificate IV in Advertising
BSB40110	Certificate IV in Legal Services
BSB40207	Certificate IV in Business
BSB40311	Certificate IV in Customer Contact
BSB40407	Certificate IV in Small Business Management
BSB40507	Certificate IV in Business Administration
BSB40610	Certificate IV in Business Sales
BSB40707	Certificate IV in Franchising
BSB40807	Certificate IV in Frontline Management
BSB40907	Certificate IV in Governance
BSB41007	Certificate IV in Human Resources
BSB41107	Certificate IV in International Trade
BSB41307	Certificate IV in Marketing
BSB41407	Certificate IV in Occupational Health and Safety
BSB41507	Certificate IV in Project Management
BSB41607	Certificate IV in Purchasing
BSB41707	Certificate IV in Recordkeeping
BSB41807	Certificate IV in Unionism and Industrial Relations

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Code	Title
BSB41910	Certificate IV in Business (Governance)
BSB50107	Diploma of Advertising
BSB50110	Diploma of Legal Services
BSB50207	Diploma of Business
BSB50311	Diploma of Customer Contact
BSB50407	Diploma of Business Administration
BSB50507	Diploma of Franchising
BSB50607	Diploma of Human Resources Management
BSB50710	Diploma of Business (Governance)
BSB50807	Diploma of International Business
BSB51107	Diploma of Management
BSB51207	Diploma of Marketing
BSB51307	Diploma of Occupational Health and Safety
BSB51407	Diploma of Project Management
BSB51507	Diploma of Purchasing
BSB51607	Diploma of Quality Auditing
BSB51707	Diploma of Recordkeeping
BSB51807	Diploma of Unionism and Industrial Relations
BSB60110	Advanced Diploma of Advertising
BSB60207	Advanced Diploma of Business
BSB60407	Advanced Diploma of Management
BSB60507	Advanced Diploma of Marketing
BSB60607	Advanced Diploma of Occupational Health and Safety
BSB60707	Advanced Diploma of Project Management

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Code	Title
BSB60807	Advanced Diploma of Recordkeeping
BSB60907	Advanced Diploma of Management (Human Resources)

Skill Sets in this Training Package

Definition

Skill sets are defined as single units of competency, or combinations of units of competency, from an endorsed Training Package, which link to a licence or regulatory requirement, or defined industry need.

Wording on Statements of Attainment

Skill sets are a way of publicly identifying logical groupings of units of competency that meet an identified need or industry outcome. Skill sets are not qualifications.

Where skill sets are identified in a Training Package, the Statement of Attainment can set out the units of competency a person has achieved in a way that is consistent and clear for employers and others. This is done by including the wording 'These units of competency meet industry requirements for [*insert skill set title or identified industry area*]' on the Statement of Attainment. This wording applies only to skill sets that are formally identified as such in the endorsed Training Package. See the 2010 edition of the AQF Implementation Handbook for advice on wording on Statements of Attainment.
http://www.aqf.edu.au/Portals/0/Documents/Handbook/AustQuals%20 FrmwrkFirstEditionJuly2011_FINAL.pdf

Skill Sets in this Training Package

This section provides information on skill sets in this Training Package, with the following important disclaimer: Readers should ensure that they have also read the part of the Training Package that outlines licensing and regulatory requirements.

Aspiring supervisor
Basic Contact Centre Operations
Copyright
Design Fundamentals
Design Protection

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Franchising
Governance Induction
Innovation Leadership
Innovation Practice
Intellectual Property Strategic Management
Key Management
Key Recordkeeping
Legal Transcription
Managing Innovation
Medical Transcription
Patent
Small Business Contracting
Small Business Financial Management
Small Business Home Based
Small Business Indigenous Corporate Governance
Small Business Intellectual Property
Small Business Marketing
Small Business Operations Preparatory
Small Business Preparatory
Trade Mark

Units of Competency in this Training Package

Unit code	Unit title

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Unit code	Unit title
BSBADM101A	Use business equipment and resources
BSBADM301B	Produce texts from shorthand notes
BSBADM302B	Produce texts from notes
BSBADM303B	Produce texts from audio transcription
BSBADM307B	Organise schedules
BSBADM311A	Maintain business resources
BSBADM401B	Produce complex texts from shorthand notes
BSBADM405B	Organise meetings
BSBADM406B	Organise business travel
BSBADM407B	Administer projects
BSBADM409A	Coordinate business resources
BSBADM411A	Produce complex texts from audio transcription
BSBADM502B	Manage meetings
BSBADM503B	Plan and manage conferences
BSBADM504B	Plan or review administrative systems
BSBADM506B	Manage business document design and development
BSBADV402B	Conduct pre campaign testing
BSBADV403B	Monitor advertising production
BSBADV404B	Schedule advertisements
BSBADV405A	Perform media calculations
BSBADV406A	Buy and monitor media
BSBADV407A	Apply media analysis and processing tools
BSBADV408A	Review advertising media options
BSBADV503B	Coordinate advertising research

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Unit code	Unit title
BSBADV507B	Develop a media plan
BSBADV509A	Create mass print media advertisements
BSBADV510A	Create mass electronic media advertisements
BSBADV602B	Develop an advertising campaign
BSBADV603B	Manage advertising production
BSBADV604B	Execute an advertising campaign
BSBADV605B	Evaluate campaign effectiveness
BSBATSIC411C	Communicate with the community
BSBATSIC412A	Maintain and protect cultural values in the organisation
BSBATSIC511A	Plan and conduct a community meeting
BSBATSIL408C	Manage a Board meeting
BSBATSIL411A	Undertake the roles and responsibilities of a board member
BSBATSIL412A	Participate effectively as a board member
BSBATSIL413A	Review and apply the constitution
BSBATSIL503C	Manage conflict
BSBATSIL510A	Appoint and work with a manager
BSBATSIL511A	Lead the organisation’s strategic planning cycle
BSBATSIL512A	Be a leader in the community
BSBATSIM412B	Implement a businesslike approach
BSBATSIM414C	Oversee the organisation’s annual budget
BSBATSIM416A	Oversee organisational planning
BSBATSIM417A	Implement organisational plans
BSBATSIM418A	Oversee financial management
BSBATSIM419A	Contribute to the development and implementation of organisational

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Unit code	Unit title
	policies
BSBATSIM420A	Oversee asset management
BSBATSIM421A	Support a positive and culturally appropriate workplace culture
BSBATSIM505C	Control organisation finances
BSBATSIM506C	Develop employment policies
BSBATSIM511C	Develop enterprise opportunities
BSBATSIM514A	Recruit and induct staff
BSBATSIW416C	Obtain and manage consultancy services
BSBATSIW417C	Select and use technology
BSBATSIW514C	Represent your organisation
BSBATSIW515C	Secure funding
BSBAUD402B	Participate in a quality audit
BSBAUD501B	Initiate a quality audit
BSBAUD503B	Lead a quality audit
BSBAUD504B	Report on a quality audit
BSBCCO203A	Conduct customer contact
BSBCCO204A	Collect data
BSBCCO205A	Prepare for work in a customer contact environment
BSBCCO301B	Use multiple information systems
BSBCCO302B	Deploy customer service field staff
BSBCCO303B	Conduct a telemarketing campaign
BSBCCO304C	Provide sales solutions to customers
BSBCCO305B	Process credit applications
BSBCCO306B	Process complex accounts

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Unit code	Unit title
BSBCCO307A	Work effectively in customer contact
BSBCCO308A	Conduct outbound customer contact
BSBCCO309A	Develop product and service knowledge for customer contact operation
BSBCCO403A	Schedule customer contact activity
BSBCCO404A	Collect, analyse and record information
BSBCCO405A	Survey stakeholders to gather and record information
BSBCCO406A	Run a multicentre
BSBCCO407A	Administer customer contact technology
BSBCCO501B	Develop business continuity strategy
BSBCCO502A	Establish a multicentre
BSBCCO503A	Manage data interrogation
BSBCCO504A	Integrate customer contact operations in the organisation
BSBCCO601B	Optimise customer contact operations
BSBCCO602B	Manage customer contact information
BSBCCO603B	Design and launch new customer contact facilities
BSBCCO604B	Develop and maintain a service level strategy
BSBCCO605B	Develop and maintain a customer contact marketing strategy
BSBCCO606B	Forecast and plan using customer contact traffic information analysis
BSBCCO607B	Manage customer contact centre staffing
BSBCCO608B	Manage customer contact operational costs
BSBCMM101A	Apply basic communication skills
BSBCMM201A	Communicate in the workplace
BSBCMM301B	Process customer complaints
BSBCMM401A	Make a presentation

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Unit code	Unit title
BSBCMM402A	Implement effective communication strategies
BSBCMM501A	Develop and nurture relationships
BSBCMN311B	Maintain workplace safety
BSBCOM401B	Organise and monitor the operation of compliance management system
BSBCOM402B	Implement processes for the management of a breach in compliance requirements
BSBCOM403B	Provide education and training on compliance requirements and systems
BSBCOM404B	Promote and liaise on compliance requirements, systems and related issues
BSBCOM405A	Promote compliance with legislation
BSBCOM406A	Conduct work within a compliance framework
BSBCOM501B	Identify and interpret compliance requirements
BSBCOM502B	Evaluate and review compliance
BSBCOM503B	Develop processes for the management of breaches in compliance requirements
BSBCOM601B	Research compliance requirements and issues
BSBCOM602B	Develop and create compliance requirements
BSBCOM603C	Plan and establish compliance management systems
BSBCON401A	Work effectively in a business continuity context
BSBCON601B	Develop and maintain business continuity plans
BSBCON701A	Establish and review the business continuity management framework and strategies
BSBCRT101A	Apply critical thinking techniques
BSBCRT301A	Develop and extend critical and creative thinking skills
BSBCRT401A	Articulate, present and debate ideas
BSBCRT402A	Collaborate in a creative process

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Unit code	Unit title
BSBCRT403A	Explore the history and social impact of creativity
BSBCRT501A	Originate and develop concepts
BSBCRT601A	Research and apply concepts and theories of creativity
BSBCUS201B	Deliver a service to customers
BSBCUS301B	Deliver and monitor a service to customers
BSBCUS401B	Coordinate implementation of customer service strategies
BSBCUS402B	Address customer needs
BSBCUS403B	Implement customer service standards
BSBCUS501C	Manage quality customer service
BSBDES201A	Follow a design process
BSBDES202A	Evaluate the nature of design in a specific industry context
BSBDES301A	Explore the use of colour
BSBDES302A	Explore and apply the creative design process to 2D forms
BSBDES303A	Explore and apply the creative design process to 3D forms
BSBDES304A	Source and apply design industry knowledge
BSBDES305A	Source and apply information on the history and theory of design
BSBDES401A	Generate design solutions
BSBDES402A	Interpret and respond to a design brief
BSBDES403A	Develop and extend design skills and practice
BSBDES501A	Implement design solutions
BSBDES502A	Establish, negotiate and refine a design brief
BSBDES601A	Manage design realisation
BSBDES602A	Research global design trends
BSBDES701A	Research and apply design theory

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Unit code	Unit title
BSBDIV301A	Work effectively with diversity
BSBDIV501A	Manage diversity in the workplace
BSBDIV601A	Develop and implement diversity policy
BSBDIV701A	Develop cross cultural communication and negotiation strategies
BSBEBU401A	Review and maintain a website
BSBEBU501A	Investigate and design e business solutions
BSBEBU502A	Implement e business solutions
BSBEDU301A	Assist with monitoring compliance in international education services
BSBEDU302A	Assist in resolution of issues and incidents in an international education environment
BSBEDU303A	Assist with the provision of international education information
BSBEDU304A	Assist with the provision of pastoral care services to international students
BSBEDU305A	Assist with international education events and programs
BSBEDU401A	Coordinate provision of pastoral care services to international students
BSBEDU501A	Facilitate international education compliance
BSBEDU502A	Manage international education issues and incidents
BSBEDU503A	Manage international student recruitment and selection
BSBEDU504A	Manage international education and training processes
BSBEDU505A	Manage international client accommodation services
BSBEDU506A	Facilitate international education events and programs
BSBEDU507A	Manage transnational offshore education programs
BSBEDU508A	Manage international education financial and administrative processes
BSBEDU509A	Use information to enhance international education work role performance
BSBEDU701A	Investigate current trends in internationalisation of education

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Unit code	Unit title
BSBEDU702A	Establish international onshore education initiatives
BSBEDU703A	Establish transnational offshore education initiatives
BSBEDU704A	Conduct applied international education research
BSBEMS401B	Develop and implement business development strategies to expand client base
BSBEMS402B	Develop and implement strategies to source and assess candidates
BSBEMS403B	Develop and provide employment management services to candidates
BSBEMS404B	Manage the recruitment process for client organisations
BSBFIA301A	Maintain financial records
BSBFIA302A	Process payroll
BSBFIA303A	Process accounts payable and receivable
BSBFIA304A	Maintain a general ledger
BSBFIA401A	Prepare financial reports
BSBFIA402A	Report on financial activity
BSBFIA501A	Report on finances related to international business
BSBFIM501A	Manage budgets and financial plans
BSBFIM502A	Manage payroll
BSBFIM601A	Manage finances
BSBFIM701A	Manage financial resources
BSBFLM303C	Contribute to effective workplace relationships
BSBFLM305C	Support operational plan
BSBFLM306C	Provide workplace information and resourcing plans
BSBFLM309C	Support continuous improvement systems and processes
BSBFLM311C	Support a workplace learning environment

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Unit code	Unit title
BSBFLM312C	Contribute to team effectiveness
BSBFRA301B	Work within a franchise
BSBFRA401B	Manage compliance with franchisee obligations and legislative requirements
BSBFRA402B	Establish a franchise
BSBFRA403B	Manage relationship with franchisor
BSBFRA404B	Manage a multiple site franchise
BSBFRA501B	Establish a franchise operation
BSBFRA502B	Manage a franchise operation
BSBFRA503B	Manage establishment of new sites or regions
BSBFRA504B	Manage relationships with franchisees
BSBFRA505B	Manage closure of a franchise
BSBGOV401A	Implement Board member responsibilities
BSBGOV402A	Work within organisational structure
BSBGOV403A	Analyse financial reports and budgets
BSBHRM401A	Review human resources functions
BSBHRM402A	Recruit, select and induct staff
BSBHRM403A	Support performance management process
BSBHRM501A	Manage human resources services
BSBHRM502A	Manage human resources management information systems
BSBHRM503B	Manage performance management systems
BSBHRM504A	Manage workforce planning
BSBHRM505B	Manage remuneration and employee benefits
BSBHRM506A	Manage recruitment selection and induction processes

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Unit code	Unit title
BSBHRM507A	Manage separation or termination
BSBHRM509A	Manage rehabilitation or return to work programs
BSBHRM510A	Manage mediation processes
BSBHRM511A	Manage expatriate staff
BSBHRM602B	Manage human resources strategic planning
BSBHRM604A	Manage employee relations
BSBIND201A	Work effectively in a business environment
BSBIND301A	Work effectively in an educational environment
BSBIND302A	Work effectively in the international education services industry
BSBINM201A	Process and maintain workplace information
BSBINM202A	Handle mail
BSBINM301A	Organise workplace information
BSBINM302A	Utilise a knowledge management system
BSBINM303A	Handle receipt and despatch of information
BSBINM401A	Implement workplace information system
BSBINM501A	Manage an information or knowledge management system
BSBINM601A	Manage knowledge and information
BSBINN201A	Contribute to workplace innovation
BSBINN301A	Promote innovation in a team environment
BSBINN501A	Establish systems that support innovation
BSBINN502A	Build and sustain an innovative work environment
BSBINN601B	Manage organisational change
BSBINN801A	Lead innovative thinking and practice
BSBINT301B	Apply knowledge of the international trade environment to complete work

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Unit code	Unit title
BSBINT302B	Apply knowledge of legislation relevant to international trade to complete work
BSBINT303B	Organise the importing and exporting of goods
BSBINT304B	Assist in the international transfer of services
BSBINT305B	Prepare business documents for the international trade of goods
BSBINT306B	Apply knowledge of international finance and insurance to complete work requirements
BSBINT401B	Research international business opportunities
BSBINT405B	Apply knowledge of import and export international conventions, laws and finance
BSBINT407B	Prepare business advice on export Free on Board Value
BSBINT408B	Prepare business advice on the taxes and duties for international trade transactions
BSBINT409B	Plan for international trade
BSBIPR301A	Comply with organisational requirements for protection and use of intellectual property
BSBIPR401A	Use and respect copyright
BSBIPR402A	Protect and use new inventions and innovations
BSBIPR403A	Protect and use brands and business identity
BSBIPR404A	Protect and use innovative designs
BSBIPR405A	Protect and use intangible assets in small business
BSBIPR501A	Manage intellectual property to protect and grow business
BSBIPR601A	Develop and implement strategies for intellectual property management
BSBITA401A	Design databases
BSBITA601A	Configure and optimise customer contact technology
BSBITB501A	Establish and maintain a workgroup computer network

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Unit code	Unit title
BSBITB701A	Implement advanced electronic technologies
BSBITS401B	Maintain business technology
BSBITU101A	Operate a personal computer
BSBITU102A	Develop keyboard skills
BSBITU201A	Produce simple word processed documents
BSBITU202A	Create and use spreadsheets
BSBITU203A	Communicate electronically
BSBITU301A	Create and use databases
BSBITU302B	Create electronic presentations
BSBITU303A	Design and produce text documents
BSBITU304A	Produce spreadsheets
BSBITU305A	Conduct online transactions
BSBITU306A	Design and produce business documents
BSBITU307A	Develop keyboarding speed and accuracy
BSBITU309A	Produce desktop published documents
BSBITU401A	Design and develop complex text documents
BSBITU402A	Develop and use complex spreadsheets
BSBITU404A	Produce complex desktop published documents
BSBLED101A	Plan skills development
BSBLED301A	Undertake elearning
BSBLED401A	Develop teams and individuals
BSBLED501A	Develop a workplace learning environment
BSBLED502A	Manage programs that promote personal effectiveness
BSBLED503A	Maintain and enhance professional practice

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Unit code	Unit title
BSBLED701A	Lead personal and strategic transformation
BSBLED702A	Lead learning strategy implementation
BSBLED703A	Implement improved learning practice
BSBLED704A	Review enterprise e learning systems and solutions implementation
BSBLED705A	Plan and implement a mentoring program
BSBLED706A	Plan and implement a coaching strategy
BSBLED707A	Establish career development services
BSBLED708A	Conduct a career development session
BSBLED709A	Identify and communicate trends in career development
BSBLED710A	Develop human capital
BSBLEG301A	Apply knowledge of the legal system to complete tasks
BSBLEG302A	Carry out search of the public record
BSBLEG303A	Deliver court documentation
BSBLEG304A	Apply the principles of confidentiality and security within the legal environment
BSBLEG305A	Use legal terminology in order to carry out tasks
BSBLEG306A	Maintain records for time and disbursements in a legal practice
BSBLEG308A	Assist in prioritising and planning activities in a legal practice
BSBLEG403B	Maintain trust accounts
BSBLEG413A	Identify and apply the legal framework
BSBLEG414A	Establish and maintain a file in legal services
BSBLEG415A	Apply the principles of contract law
BSBLEG416A	Apply the principles of the law of torts
BSBLEG417A	Apply the principles of evidence law

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Unit code	Unit title
BSBLEG418A	Produce complex legal documents
BSBLEG510A	Apply legal principles in family law matters
BSBLEG511A	Apply legal principles in criminal law matters
BSBLEG512A	Apply legal principles in property law matters
BSBLEG513A	Apply legal principles in corporation law matters
BSBLEG514A	Assist with civil procedure
BSBLEG515A	Apply legal principles in wills and probate matters
BSBMED301B	Interpret and apply medical terminology appropriately
BSBMED302B	Prepare and process medical accounts
BSBMED303B	Maintain patient records
BSBMED304B	Assist in controlling stocks and supplies
BSBMED305B	Apply the principles of confidentiality, privacy and security within the medical environment
BSBMED401B	Manage patient record keeping system
BSBMGT401A	Show leadership in the workplace
BSBMGT402A	Implement operational plan
BSBMGT403A	Implement continuous improvement
BSBMGT404A	Lead and facilitate off site staff
BSBMGT405A	Provide personal leadership
BSBMGT406A	Plan and monitor continuous improvement
BSBMGT502B	Manage people performance
BSBMGT515A	Manage operational plan
BSBMGT516C	Facilitate continuous improvement
BSBMGT605B	Provide leadership across the organisation

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Unit code	Unit title
BSBMGT608C	Manage innovation and continuous improvement
BSBMGT615A	Contribute to organisation development
BSBMGT616A	Develop and implement strategic plans
BSBMGT617A	Develop and implement a business plan
BSBMGT618A	Develop a contact centre business plan
BSBMKG401B	Profile the market
BSBMKG402B	Analyse consumer behaviour for specific markets
BSBMKG408B	Conduct market research
BSBMKG409A	Design direct response offers
BSBMKG410A	Test direct marketing activities
BSBMKG411A	Analyse direct marketing databases
BSBMKG412A	Conduct e-marketing communications
BSBMKG413A	Promote products and services
BSBMKG414B	Undertake marketing activities
BSBMKG415A	Research international markets
BSBMKG416A	Market goods and services internationally
BSBMKG501B	Identify and evaluate marketing opportunities
BSBMKG502B	Establish and adjust the marketing mix
BSBMKG506B	Plan market research
BSBMKG507A	Interpret market trends and developments
BSBMKG508A	Plan direct marketing activities
BSBMKG509A	Implement and monitor direct marketing activities
BSBMKG510B	Plan e-marketing communications
BSBMKG511A	Analyse data from international markets

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Unit code	Unit title
BSBMKG512A	Forecast international market and business needs
BSBMKG513A	Promote products and services to international markets
BSBMKG514A	Implement and monitor marketing activities
BSBMKG515A	Conduct a marketing audit
BSBMKG516B	Profile international markets
BSBMKG517A	Analyse consumer behaviour for specific international markets
BSBMKG518A	Plan and implement services marketing
BSBMKG519A	Plan and implement business-to-business marketing
BSBMKG520A	Manage compliance within the marketing legislative framework
BSBMKG521A	Plan and implement sponsorship and event marketing
BSBMKG522A	Plan measurement of marketing effectiveness
BSBMKG523A	Design and develop an integrated marketing communication plan
BSBMKG603B	Manage the marketing process
BSBMKG605B	Evaluate international marketing opportunities
BSBMKG606B	Manage international marketing programs
BSBMKG607B	Manage market research
BSBMKG608A	Develop organisational marketing objectives
BSBMKG609A	Develop a marketing plan
BSBMKG610A	Develop, implement and monitor a marketing campaign
BSBMKG611A	Manage measurement of marketing effectiveness
BSBOHS201A	Participate in OHS processes
BSBOHS301B	Apply knowledge of OHS legislation in the workplace
BSBOHS302B	Participate effectively in OHS communication and consultative processes
BSBOHS303B	Contribute to OHS hazard identification and risk assessment

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Unit code	Unit title
BSBOHS304B	Contribute to OHS hazard control
BSBOHS305B	Contribute to OHS issue resolution
BSBOHS306B	Contribute to implementing emergency prevention activities and response procedures
BSBOHS307B	Participate in OHS investigations
BSBOHS401B	Contribute to the implementation of a systematic approach to managing OHS
BSBOHS402B	Contribute to the implementation of the OHS consultation process
BSBOHS403B	Identify hazards and assess OHS risks
BSBOHS404B	Contribute to the implementation of strategies to control OHS risk
BSBOHS405B	Contribute to the implementation of emergency procedures
BSBOHS406C	Use equipment to conduct workplace monitoring
BSBOHS407A	Monitor a safe workplace
BSBOHS408A	Assist with compliance with OHS and other relevant laws
BSBOHS501B	Participate in the coordination and maintenance of a systematic approach to managing OHS
BSBOHS502B	Participate in the management of the OHS information and data systems
BSBOHS503B	Assist in the design and development of OHS participative arrangements
BSBOHS504B	Apply principles of OHS risk management
BSBOHS505C	Manage hazards in the work environment
BSBOHS506B	Monitor and facilitate the management of hazards associated with plant
BSBOHS507B	Facilitate the application of principles of occupational health to control OHS risk
BSBOHS508B	Participate in the investigation of incidents
BSBOHS509A	Ensure a safe workplace
BSBOHS601B	Develop a systematic approach to managing OHS

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Unit code	Unit title
BSBOHS602B	Develop OHS information and data analysis and reporting and recording processes
BSBOHS603B	Analyse and evaluate OHS risk
BSBOHS604B	Apply ergonomic principles to control OHS risk
BSBOHS605B	Apply occupational hygiene principles to control OHS risk
BSBOHS606B	Develop and implement crisis management processes
BSBOHS607B	Advise on application of safe design principles to control OHS risk
BSBOHS608B	Conduct an OHS audit
BSBOHS609B	Evaluate an organisation’s OHS performance
BSBPMG401A	Apply project scope management techniques
BSBPMG402A	Apply time management techniques
BSBPMG403A	Apply cost management techniques
BSBPMG404A	Apply quality management techniques
BSBPMG405A	Apply human resources management approaches
BSBPMG406A	Apply communications management techniques
BSBPMG407A	Apply risk management techniques
BSBPMG408A	Apply contract and procurement procedures
BSBPMG501A	Manage application of project integrative processes
BSBPMG502A	Manage project scope
BSBPMG503A	Manage project time
BSBPMG504A	Manage project costs
BSBPMG505A	Manage project quality
BSBPMG506A	Manage project human resources
BSBPMG507A	Manage project communications

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Unit code	Unit title
BSBPMG508A	Manage project risk
BSBPMG509A	Manage project procurement
BSBPMG510A	Manage projects
BSBPMG601A	Direct the integration of projects
BSBPMG602A	Direct the scope of a project program
BSBPMG603A	Direct time management of a project program
BSBPMG604A	Direct cost management of a project program
BSBPMG605A	Direct quality management of a project program
BSBPMG606A	Direct human resources management of a project program
BSBPMG607A	Direct communications management of a project program
BSBPMG608A	Direct risk management of a project program
BSBPMG609A	Direct procurement and contracting for a project program
BSBPRO301A	Recommend products and services
BSBPRO401A	Develop product knowledge
BSBPUB401A	Develop and apply knowledge of public relations industry
BSBPUB402A	Develop public relations campaigns
BSBPUB403A	Develop public relations documents
BSBPUB501A	Manage the public relations publication process
BSBPUB502A	Develop and manage complex public relations campaigns
BSBPUB503A	Manage fundraising and sponsorship activities
BSBPUB504A	Develop and implement crisis management plans
BSBPUR301B	Purchase goods and services
BSBPUR401B	Plan purchasing
BSBPUR402B	Negotiate contracts

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Unit code	Unit title
BSBPUR403B	Conduct international purchasing
BSBPUR501C	Develop, implement and review purchasing strategies
BSBPUR502B	Manage supplier relationships
BSBPUR503C	Manage international purchasing
BSBPUR504B	Manage a supply chain
BSBREL401A	Establish networks
BSBREL402A	Build client relationships and business networks
BSBREL403A	Implement international client relationship strategies
BSBREL501A	Build international client relationships
BSBREL502A	Build international business networks
BSBREL701A	Develop and cultivate collaborative partnerships and relationships
BSBRES401A	Analyse and present research information
BSBRES404A	Research legal information using primary sources
BSBRES502A	Research legal information using secondary sources
BSBRES801A	Initiate and lead applied research
BSBRKG301B	Control records
BSBRKG302B	Undertake disposal
BSBRKG303B	Retrieve information from records
BSBRKG304B	Maintain business records
BSBRKG305A	Review recordkeeping functions
BSBRKG401B	Review the status of a record
BSBRKG402B	Provide information from and about records
BSBRKG403C	Set up a business or records system for a small business
BSBRKG404A	Monitor and maintain records in an online environment

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Unit code	Unit title
BSBRKG502B	Manage and monitor business or records systems
BSBRKG505B	Document or reconstruct a business or records system
BSBRKG506A	Develop and maintain terminology and classification schemes
BSBRKG601B	Define recordkeeping framework
BSBRKG603B	Prepare a functional analysis for an organisation
BSBRKG604B	Determine security and access rules and procedures
BSBRKG605B	Determine records requirements to document a function
BSBRKG606B	Design a records retention and disposal schedule
BSBRKG607B	Document and monitor the record creating context
BSBRKG608B	Plan management of records over time
BSBRSK401A	Identify risk and apply risk management processes
BSBRSK501B	Manage risk
BSBSLS407B	Identify and plan sales prospects
BSBSLS408B	Present, secure and support sales solutions
BSBSLS501A	Develop a sales plan
BSBSLS502A	Lead and manage a sales team
BSBSMB201A	Identify suitability for micro business
BSBSMB301A	Investigate micro business opportunities
BSBSMB302A	Develop a micro business proposal
BSBSMB303A	Organise finances for the micro business
BSBSMB304A	Determine resource requirements for the micro business
BSBSMB305A	Comply with regulatory, taxation and insurance requirements for the micro business
BSBSMB306A	Plan a home based business

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Unit code	Unit title
BSBSMB307A	Set up information and communications technology for the micro business
BSBSMB401A	Establish legal and risk management requirements of small business
BSBSMB402A	Plan small business finances
BSBSMB403A	Market the small business
BSBSMB404A	Undertake small business planning
BSBSMB405B	Monitor and manage small business operations
BSBSMB406A	Manage small business finances
BSBSMB407A	Manage a small team
BSBSMB408B	Manage personal, family, cultural and business obligations
BSBSMB409A	Build and maintain relationships with small business stakeholders
BSBSUS201A	Participate in environmentally sustainable work practices
BSBSUS301A	Implement and monitor environmentally sustainable work practices
BSBSUS501A	Develop workplace policy and procedures for sustainability
BSBWOR201A	Manage personal stress in the workplace
BSBWOR202A	Organise and complete daily work activities
BSBWOR203B	Work effectively with others
BSBWOR204A	Use business technology
BSBWOR301B	Organise personal work priorities and development
BSBWOR302A	Work effectively as an off site worker
BSBWOR401A	Establish effective workplace relationships
BSBWOR402A	Promote team effectiveness
BSBWOR403A	Manage stress in the workplace
BSBWOR404B	Develop work priorities
BSBWOR501B	Manage personal work priorities and professional development

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Unit code	Unit title
BSBWOR502B	Ensure team effectiveness
BSBWRK401A	Develop and implement an organising plan
BSBWRK402A	Empower workers
BSBWRK403A	Communicate with workers
BSBWRK404A	Promote equality of opportunity and fair treatment for all workers
BSBWRK405A	Promote union values, principles and policies
BSBWRK406A	Participate in the bargaining process
BSBWRK407A	Provide advice to union members
BSBWRK408A	Undertake negotiations
BSBWRK409A	Prepare for and participate in dispute resolution
BSBWRK410A	Implement industrial relations procedures
BSBWRK501A	Develop, manage and review campaigns and projects
BSBWRK502A	Represent the union in key forums
BSBWRK503A	Coordinate case preparation and research
BSBWRK504A	Advocate and present cases for members
BSBWRK505A	Develop, implement and manage union policy
BSBWRK506A	Coordinate research and analysis
BSBWRK507A	Apply strategic unionism
BSBWRK508A	Manage and oversee bargaining
BSBWRK509A	Manage industrial relations
BSBWRT301A	Write simple documents
BSBWRT401A	Write complex documents
BSBWRT501A	Write persuasive copy

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Imported Units of Competency in this Training Package

Unit code	Unit title	Origin
CHCAD402D	Support the interests, rights and needs of clients within duty of care requirements	CHC08
CHCCS412D	Deliver and develop client service	CHC08
CHCCS405C	Work effectively with culturally diverse clients and co-workers	CHC08
CHCCS407B	Operate referral procedures	CHC08
CHCINF505C	Meet statutory and organisation information requirements	CHC08
CHCORG614A	Manage a service organisation	CHC08
CHCPOL403B	Undertake research activities	CHC08
CULMS207C	Assist with the presentation of public activities and events	CUL04
CUFWRT301A	Write content for a range of media	CUF07
CUFWRT302A	Write simple stories	CUF07
CUFWRT401A	Edit text	CUF07
CUFWRT402A	Write extended stories	CUF07
FNSFLT201A	Develop and use a personal budget	FNS10
FNSFLT203A	Develop understanding of debt and consumer credit	FNS10
FNSACC301A	Process financial transactions and extract interim reports	FNS10
FNSACC406A	Set up and operate a computerised accounting system	FNS10
FNSSAM301A	Identify opportunities for cross-selling products and services	FNS10
FNSSAM402A	Implement a sales plan	FNS10
HLTFA301B	Apply first aid	HLT07
HLTFA402B	Apply advanced first aid	HLT07
HLTFA403A	Manage first aid in the workplace	HLT07

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Unit code	Unit title	Origin
ICAA5056B	Prepare disaster recovery and contingency plans	ICA05
ICAA6149B	Implement quality assurance processes for business solutions	ICA05
ICAICT103A	Use, communicate and search securely on the internet	ICA11
ICAICT203A	Operate application software packages	ICA11
ICAICT209A	Interact with ICT clients	ICA11
ICASAS204A	Record client support requirements	ICA11
ICASAS305A	Provide IT advice to clients	ICA11
ICAU1133B	Send and retrieve information over the internet using browsers and email	ICA05
ICAU1204B	Locate and use relevant on-line information	ICA05
ICAU2006B	Operate computing packages	ICA05
PSPETHC301B	Uphold the values and principles of public service	PSP04
PSPGOV314A	Contribute to conflict management	PSP04
PSPGOV406B	Gather and analyse information	PSP04
PSPGOV407B	Provide a quotation	PSP04
PSPGOV507A	Undertake negotiations	PSP04
PSPGOV602B	Establish and maintain strategic networks	PSP04
PSPHR616A	Manage performance management system	PSP04
PSPLEGN301B	Comply with legislation in the public sector	PSP04
PSPMNGT614A	Facilitate knowledge management	PSP04
PSPPM402B	Manage simple projects	PSP04
PSPPROC406B	Procure goods and services	PSP04
PSPPROC407A	Establish procurement need	PSP04
PSPPROC408A	Develop requests for offers	PSP04

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Unit code	Unit title	Origin
PSPPROC409A	Receive and select offers	PSP04
PSPPROC410A	Administer contracts	PSP04
PSPPROC502A	Establish contract management arrangements	PSP04
PSPPROC503B	Manage contract performance	PSP04
PSPPROC504B	Finalise contracts	PSP04
PSPPROC602B	Direct the management of contracts	PSP04
SIRXQUA001A	Develop innovative ideas at work	SIR07
SIRXQUA002A	Lead a team to foster innovation	SIR07

Mapping of qualifications to previous version of Training Package

Mapping of Qualifications Key: E = equivalent, N = not equivalent			
BSB07 Version 6 **Qualifications code and title**	**BSB07 V5** **Qualifications code and title**	**Comments**	**E/N**
BSB20211 Certificate II in Customer Contact	BSB20207 Certificate II in Customer Contact	Qualification updated. Total number of units reduced from 10 to 9 and core and elective units updated. Removal of management and sales units from the electives list and units incorporated for outbound customer contact and for product knowledge for customer service operations.	N
BSB30211 Certificate III in Customer Contact	BSB30207 Certificate III in Customer Contact	Qualification updated. Number of core units reduced and revised to ensure they suit all industry sectors, particularly inbound centres.	E
BSB40311 Certificate IV in Customer Contact	BSB40307 Certificate IV in Customer Contact	Qualification updated. Number of core units reduced and revised to cover the training needs of inbound centres.	E

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Mapping of Qualifications Key: E = equivalent, N = not equivalent			
BSB07 Version 6 **Qualifications code and title**	**BSB07 V5** **Qualifications code and title**	**Comments**	**E/N**
BSB50311 Diploma of Customer Contact	BSB50307 Diploma of Customer Contact	Qualification updated. Number of core units reduced and revised to cover the training needs of inbound centres.	E
BSB60407 Advanced Diploma of Management	BSB60407 Advanced Diploma of Management	Qualification updated to include Contact Centre Operations units of competency as electives.	E
Deleted	BSB60307 Advanced Diploma of Customer Contact	Deleted due to lack of demand and uptake. Customer contact units incorporated into BSB60407 Advanced Diploma of Management as elective units.	N/A

Note:

All previous mapping between earlier versions of BSB07 is available on the IBSA website: http://www.ibsa.org.au/training-packages/by-industry/business-services.aspx

Mapping of units to previous version of Training Package

Mapping of units of competency Key: E = equivalent, N = not equivalent			
BSB07 Version 6 Units of competency code and title	**BSB07 V5 Units of competency code and title**	**Comments**	**E/N**
	BSBCCO201A Action customer contact	Deleted and replaced by BSBCCO203A Conduct customer contact.	N/A
BSBCCO203A Conduct customer contact	BSBCCO201A Action customer contact	New unit. Supersedes BSBCCO201A. Escalating enquiries and KPIs incorporated into the performance criteria. Use of multichannel communication systems emphasised in the performance criteria and range statement.	N

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Mapping of units of competency Key: E = equivalent, N = not equivalent			
BSB07 Version 6 Units of competency code and title	**BSB07 V5 Units of competency code and title**	**Comments**	**E/N**
	BSBCCO201A Action customer contact	Deleted and replaced by BSBCCO203A Conduct customer contact.	N/A
	BSBCCO202A Conduct data collection	Deleted and replaced by BSBCCO204A Collect data.	N/A
BSBCCO204A Collect data	BSBCCO202A Conduct data collection	New unit. Supersedes BSBCCO202A. Performance criteria and range statement amended to refer to 'contact' as opposed to 'calls', in line with the need to address multi-channel communication. 'Escalating calls' included in the performance criteria. Critical aspects reviewed to succinctly address the essence of the unit.	E
	BSBIND101A Work effectively in a customer	Deleted and replaced by BSBCCO205A.	N/A
BSBCCO205A Prepare for work in a customer contact environment	BSBIND101A Work effectively in a customer contact centre environment	New unit. Supersedes BSBIND101A. Performance criteria on performance management and team objective formation deleted. Problem solving deleted from required skills, and knowledge of organisational procedures, policies and guidelines deleted from required knowledge.	N
BSBCCO301B Use multiple information systems	BSBCCO301A Use multiple information systems	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Use of database management system (DBMS) to control data access, enforce data integrity, manage concurrency, and access information incorporated into the performance criteria in line with the customer contact industry's escalated use of technology. Critical aspects reviewed to succinctly address the	E

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Mapping of units of competency Key: E = equivalent, N = not equivalent			
BSB07 Version 6 Units of competency code and title	**BSB07 V5 Units of competency code and title**	**Comments**	**E/N**
	BSBCCO201A Action customer contact	Deleted and replaced by BSBCCO203A Conduct customer contact.	N/A
		essence of the unit.	
BSBCCO302B Deploy customer service field staff	BSBCCO302A Deploy customer service field staff	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Critical aspects reviewed to succinctly address the essence of the unit.	E
BSBCCO303B Conduct a telemarketing campaign	BSBCCO303A Conduct a telemarketing campaign	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCCO304C Provide sales solutions to customers	BSBCCO304B Provide sales solutions to customers	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Escalation of contact incorporated in range statement.	E
BSBCCO305B Process credit applications	BSBCCO305A Process credit applications	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCCO306B Process complex accounts	BSBCCO306A Process complex accounts	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCCO307A Work effectively in customer contact		New unit	N/A

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Mapping of units of competency Key: E = equivalent, N = not equivalent			
BSB07 Version 6 Units of competency code and title	**BSB07 V5 Units of competency code and title**	**Comments**	**E/N**
	BSBCCO201A Action customer contact	Deleted and replaced by BSBCCO203A Conduct customer contact.	N/A
BSBCCO308A Conduct outbound customer contact		New unit	N/A
BSBCCO309A Develop product and service knowledge for customer contact operation		New unit	N/A
BSBCCO403A Schedule customer contact activity		New unit	N/A
BSBCCO404A Collect, analyse and record information		New unit	N/A
	BSBCCO402A Gather, collate and record information	Deleted and replaced by BSBCCO405A Survey stakeholders to gather and record information.	N/A
BSBCCO405A Survey stakeholders to gather and record information	BSBCCO402A Gather, collate and record information	New unit. Supersedes BSBCCO402A. Title changed to reflect the true focus of the unit.	N
BSBCCO406A Run a multicentre		New unit	N/A
	BSBCCO401A Administer customer contact telecommunications technology	Deleted and replaced by BSBCCO407A	N/A
BSBCCO407A Administer customer	BSBCCO401A Administer customer	New unit. Supersedes BSBCCO401A. Title changed, required skills updated	E

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Mapping of units of competency Key: E = equivalent, N = not equivalent			
BSB07 Version 6 Units of competency code and title	**BSB07 V5 Units of competency code and title**	**Comments**	**E/N**
	BSBCCO201A Action customer contact	Deleted and replaced by BSBCCO203A Conduct customer contact.	N/A
contact technology	contact telecommunications technology	to relate to multicentre technology, and focus on learning and development practices and compliance with policy and procedures.	
BSBCCO501B Develop business continuity strategy	BSBCCO501A Develop business continuity strategies	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCCO502A Establish a multicentre		New unit	N/A
BSBCCO503A Manage data interrogation		New unit	N/A
BSBCCO504A Integrate customer contact operations in the organisation	BSBCCO609A Integrate customer contact operations within the organisation	New unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Code changed to better reflect the work outcome at a Diploma level.	E
BSBCCO601B Optimise customer contact operations	BSBCCO601A Optimise customer contact operations	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCCO602B Manage customer contact information	BSBCCO602A Manage customer contact information	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCCO603B Design and launch new customer	BSBCCO603A Design and launch new customer contact	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy	E

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Mapping of units of competency Key: E = equivalent, N = not equivalent			
BSB07 Version 6 Units of competency code and title	**BSB07 V5 Units of competency code and title**	**Comments**	**E/N**
	BSBCCO201A Action customer contact facilities	Deleted and replaced by BSBCCO203A Conduct customer contact and procedures.	N/A
BSBCCO604B Develop and maintain a service level strategy	BSBCCO604A Develop and maintain a service level strategy	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCCO605B Develop and maintain a customer contact marketing strategy	BSBCCO605A Develop and maintain a customer contact marketing strategy	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCCO606B Forecast and plan using customer contact traffic information analysis	BSBCCO606A Forecast and plan using customer contact traffic information analysis	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCCO607B Manage customer contact centre staffing	BSBCCO607A Manage customer contact centre staffing	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCCO608B Manage customer contact operational costs	BSBCCO608A Manage customer contact operational costs	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
	BSBCCO609A Integrate customer contact operations within the organisation	Deleted and replaced by BSBCCO504A Integrate customer contact operations in the organisation.	
BSBCMM301B Process customer complaints	BSBCMM301A Process customer complaints	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E

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Mapping of units of competency Key: E = equivalent, N = not equivalent			
BSB07 Version 6 Units of competency code and title	**BSB07 V5 Units of competency code and title**	**Comments**	**E/N**
	BSBCCO201A Action customer contact	Deleted and replaced by BSBCCO203A Conduct customer contact.	N/A
BSBCOM603C Plan and establish compliance management systems	BSBCOM603B Plan and establish compliance management systems	Revised unit. Required knowledge updated to incorporate current Australian Standards.	E
BSBCON601B Develop and maintain business continuity plans	BSBCON601A Develop and maintain business continuity plans	Revised unit. Required knowledge updated to incorporate current Australian Standards.	E
BSBCUS201B Deliver a service to customers	BSBCUS201A Deliver a service to customers	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCUS301B Deliver and monitor a service to customers	BSBCUS301A Deliver and monitor a service to customers	Revised unit. Performance criteria amended so that the learner is not required to 'incorporate evidence of customer satisfaction in decision to modify products or services'. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCUS401B Coordinate implementation of customer service strategies	BSBCUS401A Coordinate implementation of customer service strategies	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCUS402B Address customer needs	BSBCUS402A Address customer needs	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
BSBCUS403B	BSBCUS403A	Revised unit. Required skills updated	E

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Mapping of units of competency Key: E = equivalent, N = not equivalent			
BSB07 Version 6 Units of competency code and title	**BSB07 V5 Units of competency code and title**	**Comments**	**E/N**
	BSBCCO201A Action customer contact	Deleted and replaced by BSBCCO203A Conduct customer contact.	N/A
Implement customer service standards	Implement customer service standards	to focus on learning and development practices and compliance with policy and procedures.	
BSBCUS501C Manage quality customer service	BSBCUS501B Manage quality customer service	Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.	E
	BSBIND101A Work effectively in a customer contact centre environment	Deleted and replaced by BSBCCO205A Prepare for work in a customer contact environment	N
BSBITS401B Maintain business technology	BSBITS401A Maintain business technology	Revised unit. Required knowledge and Range Statement changed to include environmentally sustainable design practices.	E
BSBPUR501C Develop, implement and review purchasing strategies	BSBPUR501B Develop, implement and review purchasing strategies	Revised unit. Required knowledge and Range Statement changed to include environmentally sustainable practices.	E
BSBPUR503C Manage international purchasing	BSBPUR503B Manage international purchasing	Revised unit. Required knowledge and Range Statement changed to include environmentally sustainable practices.	E
BSBRKG403C Set up a business or records system for a small business	BSBRKG403B Set up a business or records system for a small business	Revised unit. Required knowledge and Range Statement changed to include environmentally sustainable practices.	E
BSBRSK501B Manage risk	BSBRSK501A Manage risk	Revised unit. Required knowledge updated to incorporate current Australian Standards.	E

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Mapping of units of competency Key: E = equivalent, N = not equivalent			
BSB07 Version 6 Units of competency code and title	**BSB07 V5 Units of competency code and title**	**Comments**	**E/N**
	BSBCCO201A Action customer contact	Deleted and replaced by BSBCCO203A Conduct customer contact.	N/A
BSBSMB405B Monitor and manage small business operations	BSBSMB405A Monitor and manage small business operations	Revised unit. Required knowledge and Range Statement changed to include environmentally sustainable practices	E
BSBWOR203B Work effectively with others	BSBWOR203A Work effectively with others	Revised unit. Required knowledge and Range Statement changed to include environmentally sustainable practices	E
BSBWOR301B Organise personal work priorities and development	BSBWOR301A Organise personal work priorities and development	Revised unit. Performance criteria and required skills updated to focus on learning and development practices, KPIs and compliance with policy and procedures.	E

Note:

All previous mapping between earlier versions of BSB07 is available on the IBSA website: http://www.ibsa.org.au/training-packages/by-industry/business-services.aspx

Historical and General Information

Units of competency for inclusion in Business Services qualifications

BSB07 Business Services Training Package qualifications allow for the inclusion of units from outside the specified field or domain in the BSB07 Business Services Training Package, and from other endorsed Training Packages or accredited courses.

The qualification rules in BSB07 on occasion, allow for units to be selected from a higher or lower qualification. The qualification rules will provide specific advice wherever this rule is applicable. The general rule is that other elective units of competency may be chosen from a qualification level directly below or above the qualification being undertaken. The purpose of this is to allow a choice that will most accurately deliver the requirements of a business, or groups of businesses, or will maximise the employability of an individual or group.

When the qualification rule allows units to be selected from a qualification above and a qualification below these units can be chosen in addition to the elective units listed, even if the elective units are at the same indicative level.

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For example, if the unit BSBHRM402A *Recruit, select and induct staff* is listed as an elective unit and selected as an elective unit, another unit could be selected from another qualification at the same indicative level.

The electives units listed are not included in the rule that applies to electives selected from other qualifications, Training Packages or accredited courses.

Advice on selection of elective units of competency

Note also that when packaging a qualification, elective units are to be selected from an equivalent level qualification unless otherwise stated.

Advice on prerequisite units

There are no prerequisite units specified within individual BSB07 units of competency. Each unit in BSB07 describes work activities required by business and contains an outline of the knowledge and skills required for that work, which are sufficient for that work. The units have been designed in line with this principle, i.e. the knowledge and skills that are integral to the work requirements are described sufficiently in the unit.

Work outcome

All vocational education qualifications must lead to a work outcome. The unique flexibility of the BSB07 Business Services Training Package qualifications is their feature; it allows for Registered Training Organisations (RTOs) to vary programs to meet:

- specific needs of a business or group of businesses
- skill needs of a locality or a particular industry application of business skills
- maximum employability of a group of students or an individual.

Maximising employability

In all cases, when packaging units to form a BSB07 qualification, RTOs must follow the principle of providing groups and individuals with the broadest possible combination of skills and attributes.

When combining units, therefore, choices must be exercised so that duplication of work outcomes do not occur either within the BSB07 or among other Training Packages.

Hence, when packaging units to form BSB20107 Certificate II in Business, it would **not** be legitimate to include BSBCMM201A Communicate in the workplace and a communication unit from another Training Package.

The Customer Contact units of competency and qualifications were previously a stream within the ICT02 Telecommunications Training Package. The IBSA Board determined that as these qualifications have broad, cross-industry application they should be relocated into BSB07.

What does BSB07 Business Services Training Package cover?

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BSB07 Business Services Training package covers a diverse range of industries and occupations comprising the Business Services sector. Business Services is a discrete industry as well as a diverse range of cross-industry functions and services supporting the commercial activities of all industries. In our global, knowledge-based economy, this very large, dynamic and growing industry is vital to Australia's economic progress. Business Services industries covered by this Training Package are described in the following pages.

Administration

The Administration category in BSB07 contains qualifications covering general, education, medical and legal administration.

There are five stand-alone Business Administration qualifications at Certificate III level. They are BSB30407 Certificate III in Business Administration, BSB30507 Certificate III in Business Administration (International Education), BSB30907 Certificate III in Business Administration (Education), BSB31007 Certificate III in Business Administration (Legal) and BSB31107 Certificate III in Business Administration (Medical).

The BSB30407 Certificate III in Business Administration has been designed for individuals working in office administration assistant or junior personal assistant positions, and replaces what was formerly known as the Specialist Administration stream in BSB01. The Medical Administration qualification is for those working in roles such as a medical receptionist, medical records clerk or medical secretary. The Legal Administration qualification is aimed at individuals working in roles such as a legal receptionist or junior legal administration. The Education qualification is suitable for persons working in roles such as education program support worker, school support officer or student services officer.

The units covered in BSB30407 Certificate III in Business Administration include general administrative and IT competencies, such as word processing, keyboarding, scheduling and using a range of software packages to produce documents and databases. Medical administration units cover areas such as medical terminology, preparing accounts, maintaining patient records, medical supplies control and confidentiality. The legal administration units cover areas such as searching public records, delivering court documents and legal terminology.

There are also skill sets in this area covering medical transcription and legal transcription.

BSB30507 Certificate III in Business Administration (International Education) was developed as part of a suite of International Education qualifications. This qualification reflects the role of an individual working in international education administration providing technical advice and support to a team. Typical job roles may include student recruitment and admissions officer, administrative assistant or receptionist within the international office of a university, or a registered training provider such as a TAFE or ELICOS private training provider.

BSB40507 Certificate IV in Business Administration is designed for people working in roles such as administration officer, accounts supervisor or executive personal assistant roles. BSB50407 Diploma of Business Administration qualification is for people in senior administration roles, such as administration manager or office manager roles.

Advertising

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There are three qualifications in this domain: BSB40107 Certificate IV in Advertising, BSB50107 Diploma of Advertising and BSB60110 Advanced Diploma of Advertising. Workers with these qualifications could include copywriters, media buyers, media analysts, account planners, production managers, art directors, and advertising managers.

The Certificate IV reflects those skills required by a member of an advertising team with units in areas such as target market and audience profiling, pre-campaign testing, production monitoring, advertisement scheduling and media buying. At the Diploma the focus shifts to include research, developing creative concepts, evaluating media options and creating advertisements. The Diploma also contains units on media planning, presenting campaign options to clients, developing advertising strategies and briefs, as well as managing the financial aspects of a campaign. The units at Advanced Diploma reflect higher order management functions in advertising including developing, managing, executing and evaluating an advertising campaign.

Business

There are six business qualifications in BSB07, which range from Certificate I to Advanced Diploma. These qualifications have been designed to be generic, broad-based and contextualised for enterprises, regions, localities and groups across the full spectrum of Australian industry. The qualifications provide essential cross-industry skills for all enterprises. They also provide a pathway for those wishing to continue on with their business studies into the higher education sector.

Business Sales

BSB40610 Certificate IV in Business Sales is designed for individuals working in organisations where sales are among services provided, but selling is not the core business. As a result, this qualification is distinguished from sales that take place in businesses whose core business involves retailing and wholesaling, which are covered by other endorsed Training Packages.

Workers with this qualification could include sales account assistants, sales agents and sales representatives. The qualification contains units on building client relationships, developing product knowledge, identifying prospects and presenting sales solutions. It also has units covering securing buyer commitment, post-sale follow-up and self-evaluating sales performance.

Compliance Management

Compliance Management units are designed to implement and maintain an organisation’s established compliance, program management systems. There are no specific compliance management qualifications. The units are ideally packaged at Certificate IV, Diploma and Advanced Diploma levels, in BSB40207 Certificate IV in Business, BSB50207 Diploma of Business, BSB51107 Diploma of Management and BSB60207 Advanced Diploma of Business. These units were developed in 2004, following extensive consultation and have been updated to be consistent with AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction – Guidelines for complaints handling in organizations, and AS ISO 15489:2004 Records management.

Customer Contact

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There are five qualifications in Customer Contact ranging from a Certificate II to an Advanced Diploma qualification.

The Certificate II is designed for customer service representatives, call/contact centre agents or telesales representatives. The Certificate III is also suitable for customer service representatives, call/contact centre agents or telesales representatives, as well as more senior customer service representatives. Units of competency covered in these qualifications include meeting customer requirements, resolving customer complaints, working effectively in a contact centre environment and actioning customer contact.

The Certificate IV qualification has been designed for analysts, quality assurance officers, schedulers, subject matter expert/coaches and team leaders. Units of competency covered in this qualification include developing teams and individuals, coordinating customer service strategies, implementing operational plans, providing leadership and managing stress in the workplace.

The Diploma is designed for analysts, campaign managers, quality assurance officers, schedulers, subject matter expert/coaches and experienced team leaders. The units of competency included in this qualification focus on the development of management skills, such as facilitating continuous improvement and capitalising on change and innovation, and ensuring team effectiveness and a safe workplace.

The Advanced Diploma is designed for a wide range of managers, such as contact centre managers, customer service managers, operations and workforce managers. Units of competency in this qualification include managing customer contact information, configuring and optimising customer contact technology, developing a business plan and managing customer contact operational costs.

These qualifications were previously contained as a stream within ICT02 Telecommunications Training Package. The IBSA board has determined that these qualifications have broad application across IBSA's industries and should be relocated into BSB07.

Human Resource Management

The Human Resource Management category reflects ongoing fundamental changes in the work of human resource managers to contributing strategically and operationally to organisational performance.

There are three Human Resource Management qualifications in BSB07. These are BSB41007 Certificate IV in Human Resources, BSB50607 Diploma of Human Resources Management and BSB60907 Advanced Diploma of Management (Human Resources). Workers with these qualifications could include human resource assistants, human resource officers, payroll officers, human resource managers, human resource coordinators, human resource consultants, recruiters and organisational change managers.

The units in these qualifications cover the range of human resource functions, including recruitment, selection, performance management, workforce planning, industrial relations, remuneration and benefits, managing outsourced services, mediation and rehabilitation programs. The four units from the Employment Services domain in BSB01 have been transferred to the Human Resource Management area in BSB07. Flexible packaging rules allow the human resource management units to be incorporated into other qualifications.

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Franchising

There are two qualifications in this domain, BSB40707 Certificate IV in Franchising and BSB50507 Diploma of Franchising. The Certificate IV is targeted at franchisees and covers establishing and operating a franchise, managing compliance and the relationship with the franchisor. The Diploma covers establishing a franchise, managing the opening of new sites and expansion, managing relationships with franchisees, and closing a franchise.

There is also a skill set for consultants assisting people to buy into a franchise, or to franchise an existing business operation.

Governance

There are three governance qualifications in BSB07: the revised qualification BSB41910 Certificate IV in Business (Governance), replacing the BSB41907, the BSB50710 revised Diploma of Business (Governance) replacing the BSB50707 and BSB40907 Certificate IV in Governance.

BSB41910 Certificate IV in Business (Governance) and BSB50710 Diploma of Business (Governance) are specialist qualifications for board members of Indigenous organisations. These qualifications follow a review and development by IBSA and the Office of the Registrar of Indigenous Corporations.

BSB40907 Certificate IV in Governance is a generic governance qualification designed for board members with responsibility for coordinating high quality governance within an organisation. There are units on implementing board member responsibilities, analysing financial reports and working within an organisational structure. There are also several electives within the qualification that allow for a specialisation in Indigenous governance. Such units cover maintaining and protecting Indigenous culture, communicating with the community, managing Indigenous cultural processes, and contributing to a culturally appropriate workplace.

Intellectual Property

Intellectual Property units are designed for organisations to protect, manage and use intellectual property, and include units relating to patents, trademarks, design and copyright. There are no specific intellectual property qualifications. The intellectual property units can be packaged as electives in a range of qualifications from Certificate III to Advanced Diploma. These units were developed in 2008 following extensive consultation, after a scoping report identified a high perceived importance of intellectual property and a strong stated need for competency-based related training.

International Education Services

BSB30507 Certificate III in Business Administration (International Education) reflects the role of an individual working in international education administration providing technical advice and support to a team. Typical job roles may include student recruitment and admissions officer, administrative assistant or receptionist within the international office of a university, or a registered training provider such as a TAFE or ELICOS private training provider.

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International Trade/Business

There are twenty-three units in the three International Trade/Business qualifications in BSB07. The three qualifications are BSB30607 Certificate III in International Trade, BSB41107 Certificate IV in International Trade, and BSB50807 Diploma of International Business. These qualifications are designed for workers and managers in export and import enterprises, and other specialist personnel involved with international trade and business.

The units cover a diverse range of skills and knowledge involved with the work of international trade/business across a range of levels. The units cover activities such as assisting in the process of importing and exporting goods, international transfer of services and international transport of goods, researching international business opportunities and markets, marketing goods and services internationally, obtaining specialist permits for import and export of goods, forecasting international market and business needs, and promoting products and services to international markets.

Legal Services

There are three qualifications in BSB07 related to Legal Services. These are BSB31007 Certificate III in Business Administration (Legal), BSB40110 Certificate IV in Legal Services and BSB50110 Diploma of Legal Services. The qualifications at Certificate IV and Diploma are designed for people working in occupations such as legal assistants, legal secretaries, legal services, assistant paralegals, support officers and legal support recruitment consultants.

The Certificate III qualification is described in more detail in the Business Administration field above.

The units in the Legal Services qualifications cover areas such as searching public records, keeping time and disbursement records, preparing court documents, and researching legal information.

Management

There are three management qualifications in BSB07: BSB40807 Certificate IV in Frontline Management, BSB51107 Diploma of Management and BSB60407 Advanced Diploma of Management.

The Certificate IV in Frontline Management, Diploma of Management and Advanced Diploma of Management incorporate units from the frontline and strategic management domains in BSB01. The qualifications are applicable to anyone with management responsibility across the full variety of organisations within the Australian economy.

The Certificate IV is designed for workers in team leader, supervisory, front desk or line management positions. The Diploma is designed for middle managers, while the Advanced Diploma is for senior managers moving towards the executive level.

The units cover areas such as finance, operations, leadership, knowledge management, entrepreneurship, risk management, customer service, diversity planning, strategy development and the execution of business goals.

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Marketing

There are three marketing qualifications in BSB07. BSB41307 Certificate IV in Marketing is designed for roles including marketing assistant, direct marketing assistant, marketing coordinator or public relations officer. The qualification covers units in areas such as profiling markets, analysing consumer behaviour, conducting market research and making marketing presentations.

BSB51207 Diploma of Marketing is designed for those working as brand managers, category managers, direct marketing managers, marketing team leaders and public relations managers. Units covered by this qualification include evaluating marketing opportunities, establishing the marketing mix, implementing marketing activities, conducting a marketing audit and interpreting market trends.

BSB60507 Advanced Diploma of Marketing is a qualification for individuals working in senior strategic marketing positions, such as marketing directors, marketing strategic directors and national, regional or global marketing managers. Units in this qualification cover areas such as managing the marketing function of an organisation, developing marketing objectives and plans.

Occupational Health and Safety

There are four occupational health and safety (OHS) qualifications from Certificate III to Advanced Diploma. These qualifications were originally developed in 2004, following extensive consultation to meet organisational needs in coordinating and maintaining OHS programs. The qualifications apply to a range of vocations including occupational health and safety coordinator, occupational health and safety officer, both generalist office manager and office manager with an occupational health and safety specialisation.

Management (Learning)

There are two qualifications at a Vocational Graduate Certificate and Vocational Graduate Diploma level in Management (Learning).

The Vocational Graduate Certificate and the Vocational Graduate Diploma reflect the roles of individuals who apply substantial specialised knowledge and skills in the field of learning and capability development.

Both qualifications are relevant to leaders and managers in an organisation where learning is used to build capability – in these roles they harness learning to enhance existing practices and thinking, workforce capability and career development. Typical job roles include human resources development (HRD) operational manager, organisational learning and leadership manager, workforce capability development leader and managers providing career development research or information.

Project Management

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There are three qualifications in this field: Certificate IV, Diploma and Advanced Diploma. These units and qualifications were originally designed in 2004, following extensive consultation. They were subsequently updated to apply to wide ranging vocational applications, including project authorisation, project scope, management of the project, costing, risk management, integrative processes, procurement and human resources project management.

Purchasing

As well as being a specific work role, purchasing is also a cross-industry and generic work function; all organisations are involved in purchasing to some extent. Units from the Purchasing area may be used in a wide range of qualifications or in the specific Purchasing qualifications at Certificate IV or Diploma, in BSB07. The Purchasing qualifications are BSB41607 Certificate IV in Purchasing and BSB51507 Diploma of Purchasing.

The Purchasing qualifications include competencies ranging from those required to handle low expenditure purchasing transactions through to those required to manage purchasing relationships including international purchasing and supply chain management, suiting a variety of workplace roles related to this specific competency field.

Quality Auditing

There is one qualification in this field, BSB51607 Diploma of Quality Auditing. The qualification applies to a wide range of specialised and managerial quality audit vocations, including planning, conducting and evaluating quality improvements, and organising and supporting quality audit systems. These units and qualification were originally developed in 2004, following extensive consultation and were subsequently streamlined to eliminate duplication.

Recordkeeping

Recordkeepers can be seen as the custodians of corporate memory. Their work ensures the retention and security of records and can involve basic records handling, reviewing and disposing of records, setting up records systems, developing recordkeeping policy, and developing and establishing record and terminology regimes.

There are four qualifications relating to recordkeeping in BSB07: BSB30807 Certificate III in Recordkeeping, BSB41707 Certificate IV in Recordkeeping, BSB51707 Diploma of Recordkeeping and BSB60807 Advanced Diploma of Recordkeeping. Workers with these qualifications would include records officers, records managers, corporate archivists and privacy officers. There is also a skill set for new recordkeepers.

The Certificate III is designed for those working in positions such as assistant records clerks, assistant registry officers and administration officers. Units in this qualification cover retrieving information, controlling, maintaining and deleting records. The Certificate IV is designed for those working in medical records, records clerks, records officers, registry officers and project assistants. Units covered include areas such as reviewing record status, setting up a recordkeeping system and electronic recordkeeping.

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The Diploma is targeted at those in senior recordkeeping positions such as archivists, records management coordinators and senior records officers. Units in this qualification cover areas such as managing and monitoring a business records management system, developing the recordkeeping system and classification systems. The Advanced Diploma qualification is suitable for senior archivists, project managers or records managers and includes units related to the design, security and conceptualisation of an organisation's recordkeeping system; particular emphasis is placed on ensuring the recordkeeping function supports the strategic objectives of the organisation.

Small Business Management

The BSB01 Small Business Management qualification was reviewed and, in response to needs identified through consultation and research undertaken for the Indigenous Small Business Skills Development Project, the following alterations and additions were made to the BSB01 Business Services Training Package:

- development of a new Certificate III – BSB30307 Certificate III in Micro Business Operations
- revision of BSB40407 Certificate IV in Small Business Management
- development of skill sets
- redevelopment of the existing small business management units and the development of new small business management units.

The consultation process undertaken with Indigenous small business organisations, individuals and small business stakeholders facilitated a careful investigation of existing national competency standards to determine whether the training and development needs of small business and micro business were being met. The resultant analysis and further industry consultation refined and updated existing Small Business Management competency standards and produced new competency standards which meet the new and emerging needs of the expanding small business and micro business industry sectors.

Unionism and Industrial Relations

There are two qualifications in this specific competency field, BSB41807 Certificate IV in Unionism and Industrial Relations and BSB51807 Diploma of Unionism and Industrial Relations. The Certificate IV is designed to cater for union organisers and workplace union representatives, while the Diploma is suitable for union officials.

The Certificate IV contains units including communicating with workers, promoting union values, principles and policies, providing advice to union members, undertaking negotiations, bargaining and negotiation. The Diploma includes units on developing campaigns, strategic planning, policy development and presenting cases for members.

Features of the BSB07 Business Services Training Package Qualifications

BSB07 Business Services Training Package contains 59 qualifications across a range of Business Services from Certificate I through to Advanced Diploma levels.

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There are no direct links between the qualifications and licensing, legislative or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative or regulatory requirements that impact on the unit.

The qualification structures have been designed on a core plus electives model, and feature the flexibility to accommodate a wide variety of industry contexts and to suit individual enterprise requirements. An added feature of the qualifications in BSB07 is that suggested electives are provided for some qualifications to achieve different vocational outcomes and Employability Skills summaries have been added to the qualification documents.

Advice has been added regarding the pathways into and from a qualification to better articulate how learners may approach a qualification. As in BSB01, there are no unit prerequisites within BSB07; however the pathways advice provides information on suggested entry levels for learners. Advice is provided for each qualification on how a candidate may enter a qualification. The pathway into a qualification is generally expressed as requiring the candidate to have:

- a completed qualification at a level immediately prior to the qualification to be undertaken

OR

- relevant vocational experience in cases where they do not possess formal qualifications or part thereof.

Categorisation of Units of Competency

Individual Training Packages usually group or categorise units under headings, variously called ‘domains’, ‘functional areas’ or ‘fields’. This ‘sorting’ process helps users navigate content and provides a structure for the way information is presented.

As part of its work to develop a more cohesive development approach, IBSA has created a set of common headings to categorise units of competency across all eleven Training Packages under its coverage. As every IBSA Training Package is reviewed and continuously improved, units of competency will be organised and presented according to this categorisation approach. The needs of all IBSA sectors have been considered in developing the new category headings.

The new categorisation approach:

- helps users to ‘find’ units across any IBSA Training Package as they will always be grouped under consistent headings
- allows IBSA to adopt a much more holistic approach to reviewing and improving units in different content areas
- assists in the process of rationalising units, as unnecessary duplication will be immediately highlighted
- allows each Training Package to select and present only the units that are relevant to a particular industry sector.

IBSA’s unit categorisation approach has two levels of heading – Broad Competency Field and Specific Competency Field. Both of these are shown in each unit of competency in accordance with the national unit template. The table below shows an *example* of the way a unit of competency has been categorised.

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Sample Unit Coding: **BSBMGT401A Show leadership in the workplace**

Three letters indicating the training package for which the unit was developed	***Three letters indicating the specific competency field of the unit***	***Three digit numeric***	***Version Identifier***
This unit has been developed for the Business Services Training Package (BSB)	Broad Competency Field: Management and Leadership Specific Competency Field: Management (MGT)	Number assigned to the unit of competency	This unit is a revised version of BSBFLM402A Show leadership in the workplace; however, because it has been recoded, the version identifier indicates that this is the first version of this unit with the current code.
BSB	**MGT**	**401**	**A**

Note: The numeric characters in the unit codes have followed the general rule of referring to the AQF qualification in which the unit is first packaged. For example, 401 indicates that this unit was first packaged at a Certificate IV level.

The following broad and specific competency fields make up BSB07. The codes applied to each specific competency field are identified in brackets.

TITLES FOR BROAD COMPETENCY FIELDS	**TITLES FOR SPECIFIC COMPETENCY FIELDS** **(alpha code)**	**DESCRIPTION** ***This code is used to indicate:***
Administration	Educational Administration (EDU)	Specialist units of competency developed for application in educational environments
	General Administration	Units of competency developed for application

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TITLES FOR BROAD COMPETENCY FIELDS	**TITLES FOR SPECIFIC COMPETENCY FIELDS** **(alpha code)**	**DESCRIPTION** ***This code is used to indicate:***
	(ADM)	in a broad range of work environments
	Legal Services Administration (LEG)	Specialist units of competency developed for application in a legal work environment
	Medical Services Administration (MED)	Specialist units of competency developed for application in medical environments including doctor's surgeries, hospitals, medical centres, hospices etc.
	Purchasing and Contracting (PUR)	Specialist units of competency developed for the procurement of goods and services
Business Development	Advertising (ADV)	Specialist units of competency developed for application in an advertising work environment
	International Business (INT)	Specialist units of competency developed for application in workplace environments involved in the import and/or export of goods and services
	Marketing (MKG)	Specialist units of competency developed for application in planning, developing and implementing marketing strategies
	Public Relations (PUB)	Specialist units of competency developed for application in public relations, fundraising and sponsorship environments
	Sales (SLS)	Specialist units of competency developed for application in the sales process and in sales management
Communication	Interpersonal Communication (CMM)	Units of competency denoting the application of interpersonal skills in a range of contexts within the workplace
	Writing (WRT)	Specialist units relating to the development and use of writing skills to communicate information
Creativity and	Creative Thinking	Units of competency requiring the application

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TITLES FOR BROAD COMPETENCY FIELDS	**TITLES FOR SPECIFIC COMPETENCY FIELDS** **(alpha code)**	**DESCRIPTION** ***This code is used to indicate:***
Innovation	(CRT)	of thought to develop concepts, ideas and constructive argument for the workplace
	Innovation (INN)	Units of competency requiring the application of skills and knowledge for the development of new practices, systems and processes for the workplace
Design	Design Process (DES)	Units of competency requiring the application of skills and knowledge for the development and application of design techniques in response to workplace requirements
Finance	Financial Admin (FIA)	Units of competency applicable to financial record preparation and reporting
	Financial Management (FIM)	Units of competency related to the general management of financial functions including budgets, payroll and reporting
Industry Capability	Continuity (CON)	Specialist units of competency developed for the application of planning, resourcing and managing business continuity to ensure the resilience and critical functions/objectives of the business can be maintained in the event of a disruptive occurrence
	Industry Context (IND)	Units of competency providing an overview of the work requirements essential in specific workplace environments
	Product Skills and Advice (PRO)	Units of competency requiring the development and application of product knowledge
	Sustainability (SUS)	Specialist units of competency developed for the application of environmentally sustainable work practices
	Workplace Effectiveness (WOR)	Units of competency developed for application as core workplace skills and practices
Information and	E-Business (EBU)	Specialist units of competency developed for

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TITLES FOR BROAD COMPETENCY FIELDS	**TITLES FOR SPECIFIC COMPETENCY FIELDS** **(alpha code)**	**DESCRIPTION** ***This code is used to indicate:***
Communications Technology		application in e-business environments
	IT Analysis and Design (ITA)	Specialist units of competency developed for application in the design and analysis of computerised systems and processes
	IT Building and Implementation (ITB)	Specialist units of competency developed for application in computer network environments
	IT Support (ITS)	Specialist units of competency developed for application in the maintenance of business technology
	IT Use (ITU)	Units of competency requiring the use of computer-based hardware and software
Knowledge Management	Information Management (INM)	Specialist units of competency requiring the application of a range of information management processes including computerised and non-computerised systems
	Recordkeeping (RKG)	Specialist units of competency developed for the application of recordkeeping procedures and practices in a broad range of work environments
	Research (RES)	Specialist units of competency required for application in the sourcing, collection, analysis and presentation of information
Management and Leadership	Frontline Management (FLM)	Units of competency requiring the application of team management skills within a work group
	Franchising (FRA)	Specialist units of competency required for application in the establishment and management of a franchise
	Management (MGT)	Specialist units of competency required for leadership, organisational development and people management in the workplace
	Project Management	Specialist units of competency required for

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TITLES FOR BROAD COMPETENCY FIELDS	**TITLES FOR SPECIFIC COMPETENCY FIELDS** **(alpha code)**	**DESCRIPTION** ***This code is used to indicate:***
	(PMG)	management and direction of projects
	Small and Micro Business (SMB)	Specialist units of competency developed for application in managing and operating micro and small businesses
Regulation, Licensing and Risk	Compliance (COM)	Specialist units of competency developed for compliance monitoring and management in a range of work environments
	Governance (GOV)	Specialist units of competency developed for application by company or Board directors
	Aboriginal and Torres Strait Islander Governance (ATSI)	Specialist units of competency developed for application in Indigenous governance work environments
	Occupational Health and Safety (OHS)	Specialist units of competency developed for implementing, monitoring and managing OHS in the workplace
	Quality Auditing (AUD)	Specialist units of competency developed for the implementation of quality audit systems
	Risk Management (RSK)	Specialist units of competency developed for application in a range of risk management contexts
	Intellectual Property (IPR)	Specialist units of competency developed for the protection, management and use of intellectual property
Stakeholder Relations	Contact Centre Operations (CCO)	Specialist units of competency developed for application in a customer contact centre environment
	Customer Service (CUS)	Specialist units of competency developed for the application of customer service skills
	Relationship Management (REL)	Specialist units of competency associated with the development of client relationships and business networks

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TITLES FOR BROAD COMPETENCY FIELDS	TITLES FOR SPECIFIC COMPETENCY FIELDS (alpha code)	DESCRIPTION *This code is used to indicate:*
Workforce Development	Diversity (DIV)	Specialist units of competency required for the development of a culturally sensitive workplace
	Human Resource Management (HRM)	Specialist units of competency required for the selection, induction, termination and wellbeing of staff
	Learning and Development (LED)	Units of competency for application in development of the workforce
	Recruitment and Employment Services (EMS)	Specialist units of competency developed for application in the provision of recruitment/employment services
	Workplace Relations (WRK)	Specialist units of competency applied in workplace review processes, dealing with and through trade unions, and in a range of industrial relations contexts

Introduction to the Industry

The business services industry is a major contributor to the Australian economy and employs a significant proportion of the workforce. However, it is not recognised as a distinct industry within the ANZSIC classification scheme used by the ABS and so the exact size and nature of the industry is difficult to quantify.

The business services industry comprises small, medium and large enterprises including multinationals and franchises. An estimated 87% of business services enterprises are SMEs. The industry includes a number of significant sectors or domains, including:

- Administration
- Advertising
- Business development
- Business governance
- Communication
- Creativity, innovation and design
- Finance
- Industry capability and workforce development

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- Information and Communications Technology
- Knowledge management
- Mail house and despatch
- Management and leadership
- Regulation, licensing and risk
- Stakeholder relations and customer contact

Business services workers provide the crucial services that keep all other industries functioning. Together receptionists, office managers, secretaries and personal assistants make up a workforce of more than 400,000. Counted together all business services occupations could account for as much as 15% of the Australian workforce. The graph below shows the workforce size (in 2008) for major business services occupations.

Emerging issues

In 2009 employers from the Business Services industry responding to IBSA's online e-scan survey indicated that the general issues they were most concerned about were:

- the economy and global financial downturn/recovery
- business taxes tariffs and regulations
- addressing environmental sustainability/green credentials (ISO14001).

Each of these issues was of concern to more than half of all Business Services industry survey respondents. In addition, almost two thirds of Business Services industry survey respondents reported that it is not easy to find applicants with the right mix and level of skills, and 42% reported that it is not easy to move quickly to adjust staff numbers and skills to suit business changes.

Survey respondents identified a critical need for skills in converging technologies including combinations of creative, IT skills and business development skills. The graph below shows areas of critical need for future industry skills as identified by the survey respondents.

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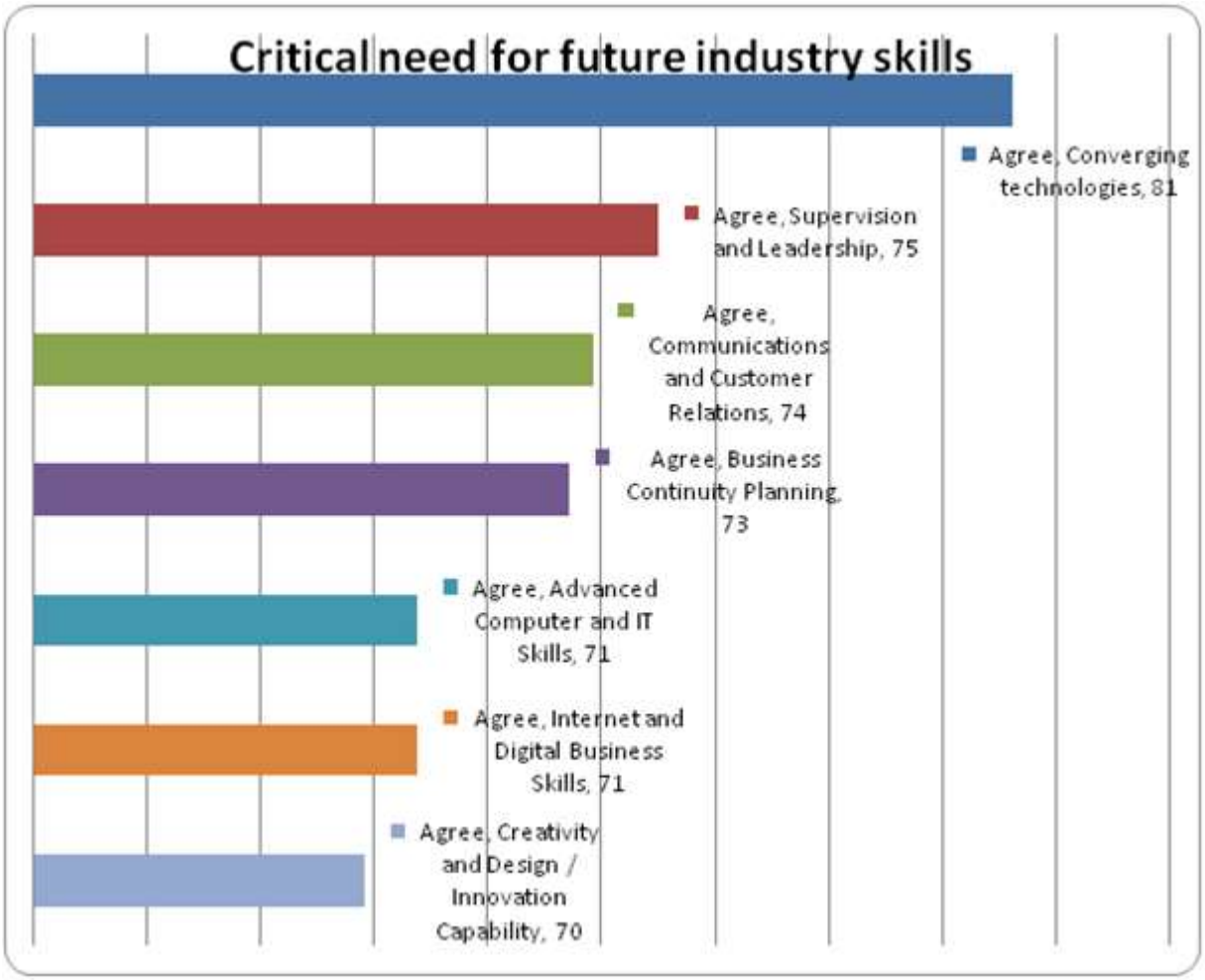

Source: IBSA online e-scan survey of the Business Services industry, November 2009.

Further detail on industry concerns was gathered though consultations with industry.

Workforce skills

Many people (particularly in SMEs) have not had assistance with literacy and numeracy and do not have the basic skills or capabilities to assimilate information – they lack learning skills and support. Numeracy is a particular problem for the calculation of currencies, import duties, GST and other tasks that require basic maths and it is difficult to get the message through, especially to small business, that training is available.

People in SMEs also lack core business skills and don't know where to go to access training for skill gaps. The economic climate is forcing people out of big business – they are starting small businesses or buying franchises without the necessary business skills. There is considerable naivety – people don't know what it takes to run a business.

Workforce flexibility

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It is necessary to reskill to accommodate the restructures coming out of the economic conditions. Businesses need to consider how to address shrinkage and ensure they still have the required pool of skills available in their remaining workforce – it's not enough just to think about head counts and ratios and getting rid of training and marketing to cut costs. They need to keep training going so the business has the necessary skills for when the economy recovers.

Technology

This is the start of the mobile, highly-connected workforce, how workplaces are designed and where people work will change and both businesses and workers need to be prepared for what the change will mean (possibly increased isolation, need for greater independence and self-motivation).

Demographic

Older generation is staying in the workforce longer and employers need to encourage them to pass information on before they leave, they also need strategies for enabling people to stay on in more flexible or part-time roles. Impact of migration and even greater multiculturalism in the workplace – need for greater cultural awareness in working with and managing others, and also dealing with customers from a variety of backgrounds (example of Honda running training for dealers on how to sell to Indian customers). Different cultures can also impact on workforce culture, perhaps making the workforce too compliant, less questioning/assertive and less innovative.

Leadership

People are looking for good leaders who know how to empower a team. Leadership is different from management and is important for innovation and for getting the best out of your workforce. Leaders (and others) need emotional intelligence (not just a qualification) and this is largely developed through experience.

Economy

A greater focus on the bottom line and profitability means that employers are reluctant to release people for training. Business is more risk averse and may be unwilling to invest in training.

Business Services Training Package

IBSA's Business Services Training Package is the most heavily used of all training packages for publicly funded VET, accounting for 13.1% of all activity in 2008. Although the current training package for this industry sector is BSB07, most of the NCVER data reported here refers to use of the previous package BSB01.

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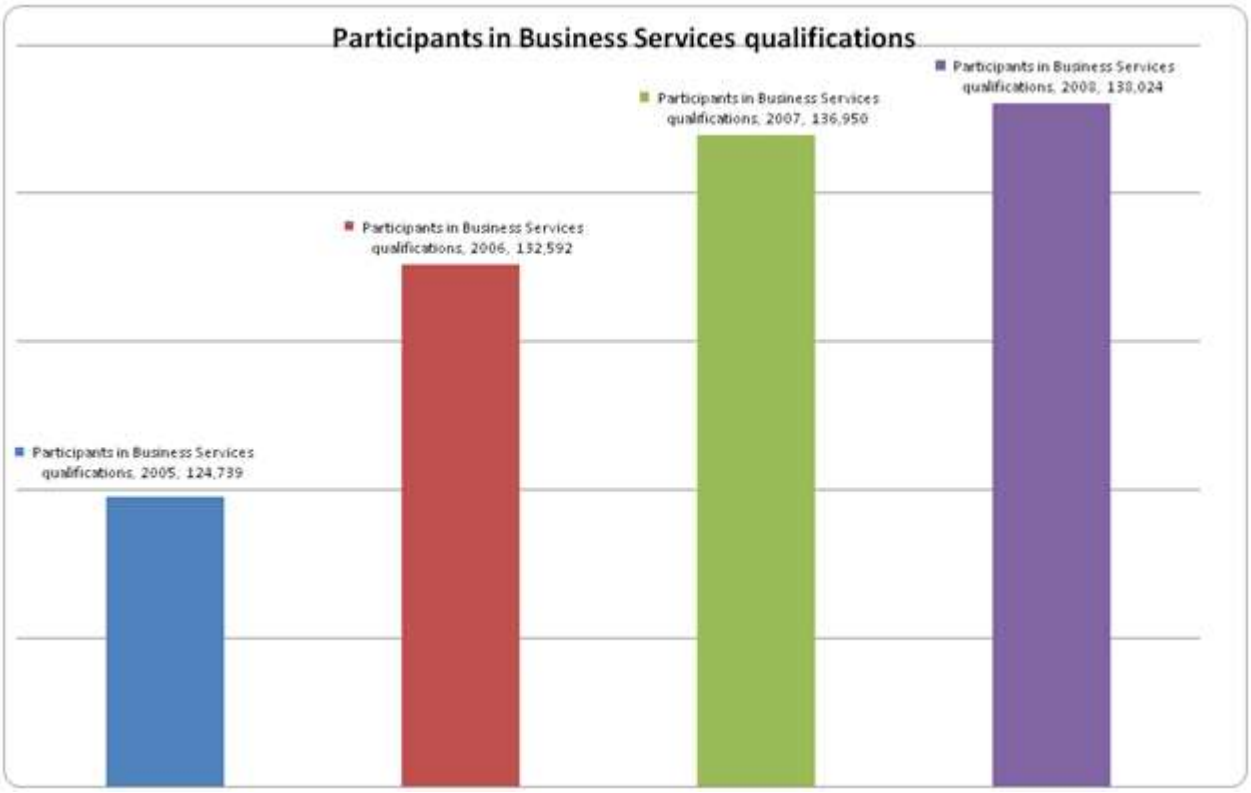

Source: NCVER VET Provider Collection 2008

Enrolments in units of competency from the Business Services Training Packages increased significantly between 2005 and 2008 as shown in the graph below.

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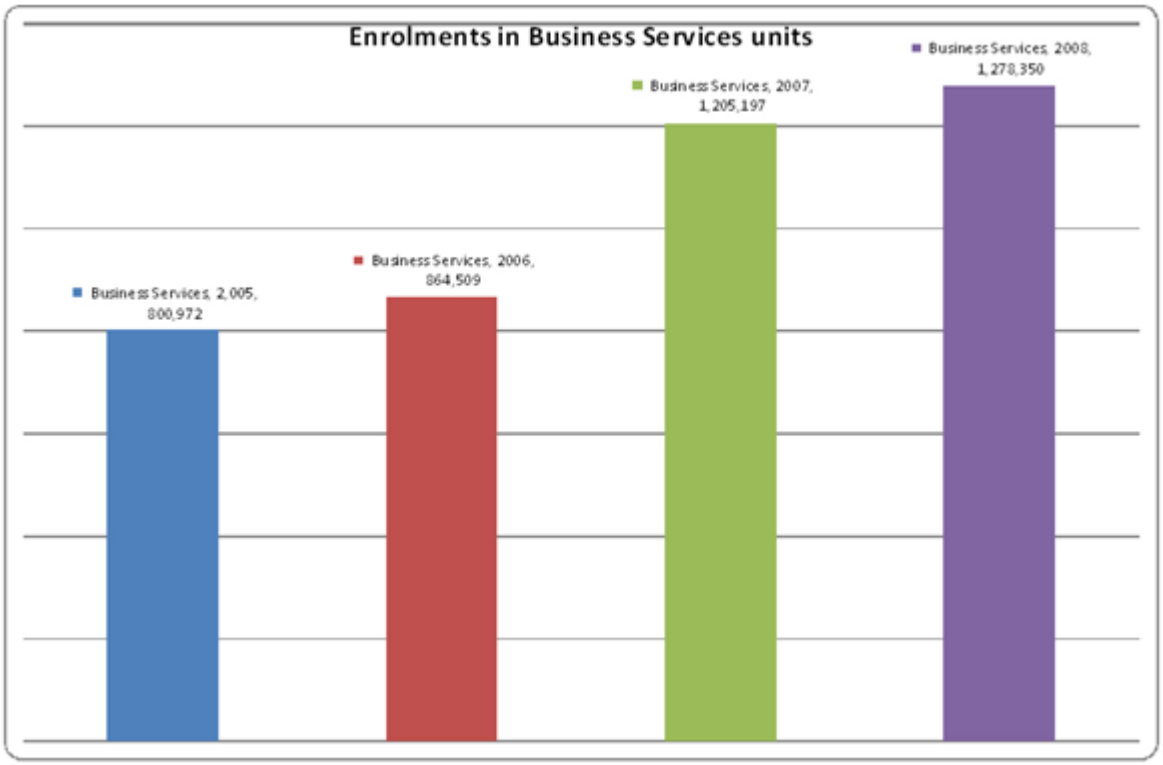

Source: *NCVER VET Provider Collection 2008*

Competency Standards - Industry Contextualisation

What is competency?

The broad concept of industry competency concerns the ability to perform particular tasks and duties to the standard of performance expected in the workplace. Competency requires the application of specified skills, knowledge and attitudes relevant to effective participation in an industry, industry sector or enterprise.

Competency covers all aspects of workplace performance and involves performing individual tasks; managing a range of different tasks; responding to contingencies or breakdowns; and, dealing with the responsibilities of the workplace, including working with others. Workplace competency requires the ability to apply relevant skills, knowledge and attitudes consistently over time and in the required workplace situations and environments. In line with this concept of competency Training Packages focus on what is expected of a competent individual in the workplace as an outcome of learning, rather than focussing on the learning process itself.

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Competency standards in Training Packages are determined by industry to meet identified industry skill needs. Competency standards are made up of a number of units of competency each of which describes a key function or role in a particular job function or occupation. Each unit of competency within a Training Package is linked to one or more AQF qualifications.

Contextualisation of Units of Competency by RTOs

RTOs may contextualise units of competency to reflect local outcomes required. Contextualisation could involve additions or amendments to the unit of competency to suit particular delivery methods, learner profiles, specific enterprise equipment requirements, or to otherwise meet local needs. However, the integrity of the overall intended outcome of the unit of competency must be maintained.Any contextualisation of units of competency in this endorsed Training Package must be within the bounds of the following advice. In contextualising units of competency, RTOs:

- must not remove or add to the number and content of elements and performance criteria
- may add specific industry terminology to performance criteria where this does not distort or narrow the competency outcomes
- may make amendments and additions to the range statement as long as such changes do not diminish the breadth of application of the competency and reduce its portability
- may add detail to the evidence guide in areas such as the critical aspects of evidence or resources and infrastructure required where these expand the breadth of the competency but do not limit its use.

Components of Units of Competency

The components of units of competency are summarised below, in the order in which they appear in each unit of competency.

Unit Title

The unit title is a succinct statement of the outcome of the unit of competency. Each unit of competency title is unique, both within and across Training Packages.

Unit Descriptor

The unit descriptor broadly communicates the content of the unit of competency and the skill area it addresses. Where units of competency have been contextualised from units of competency from other endorsed Training Packages, summary information is provided. There may also be a brief second paragraph that describes its relationship with other units of competency, and any licensing requirements.

Employability Skills statement

A standard Employability Skills statement appears in each unit of competency. This statement directs trainers and assessors to consider the information contained in the Employability Skills Summary in which the unit of competency is packaged.

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Prerequisite Units (optional)

If there are any units of competency that must be completed before the unit, these will be listed.

Application of the Unit

This sub-section fleshes out the unit of competency's scope, purpose and operation in different contexts, for example, by showing how it applies in the workplace.

Competency Field (Optional)

The competency field either reflects the way the units of competency are categorised in the Training Package or denotes the industry sector, specialisation or function. It is an optional component of the unit of competency.

Sector (optional)

The industry sector is a further categorisation of the competency field and identifies the next classification, for example an elective or supervision field.

Elements of Competency

The elements of competency are the basic building blocks of the unit of competency. They describe in terms of outcomes the significant functions and tasks that make up the competency.

Performance Criteria

The performance criteria specify the required performance in relevant tasks, roles, skills and in the applied knowledge that enables competent performance. They are usually written in passive voice. Critical terms or phrases may be written in bold italics and then defined in range statement, in the order of their appearance in the performance criteria.

Required Skills and Knowledge

The essential skills and knowledge are either identified separately or combined. Knowledge identifies what a person needs to know to perform the work in an informed and effective manner. Skills describe the application of knowledge to situations where understanding is converted into a workplace outcome.

Range Statement

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The range statement provides a context for the unit of competency, describing essential operating conditions that may be present with training and assessment, depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts. As applicable, the meanings of key terms used in the performance criteria will also be explained in the range statement.

Evidence Guide

The evidence guide is critical in assessment as it provides information to the Registered Training Organisation (RTO) and assessor about how the described competency may be demonstrated. The evidence guide does this by providing a range of evidence for the assessor to make determinations, and by providing the assessment context. The evidence guide describes:

- conditions under which competency must be assessed including variables such as the assessment environment or necessary equipment
- relationships with the assessment of any other units of competency
- suitable methodologies for conducting assessment including the potential for workplace simulation
- resource implications, for example access to particular equipment, infrastructure or situations
- how consistency in performance can be assessed over time, various contexts and with a range of evidence, and expectations at the AQF qualification level involved

Employability Skills in units of competency

The detail and application of Employability Skills facets will vary according to the job-role requirements of each industry. In developing Training Packages, industry stakeholders are consulted to identify appropriate facets of Employability Skills which are incorporated into the relevant units of competency and qualifications.

Employability Skills are not a discrete requirement contained in units of competency (as was the case with Key Competencies). Employability Skills are specifically expressed in the context of the work outcomes described in units of competency and will appear in elements, performance criteria, range statements and evidence guides. As a result, users of Training Packages are required to review the entire unit of competency in order to accurately determine Employability Skills requirements.

How Employability Skills relate to the Key Competencies

The eight nationally agreed Employability Skills now replace the seven Key Competencies in Training Packages. Trainers and assessors who have used Training Packages prior to the introduction of Employability Skills may find the following comparison useful.

Employability Skills	**Mayer Key Competencies**

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Communication	Communicating ideas and information
Teamwork	Working with others and in teams
Problem solving	Solving problems Using mathematical ideas and techniques
Initiative and enterprise	
Planning and organising	Collecting, analysing and organising information Planning and organising activities
Self-management	
Learning	
Technology	Using technology

When analysing the above table it is important to consider the relationship and natural overlap of Employability Skills. For example, using technology may involve communication skills and combine the understanding of mathematical concepts.

Explicitly embedding Employability Skills in units of competency

- This Training Package seeks to ensure that industry-endorsed Employability Skills are explicitly embedded in units of competency. The application of each skill and the level of detail included in each part of the unit will vary according to industry requirements and the nature of the unit of competency.

Employability Skills must be both explicit and embedded within units of competency. This means that Employability Skills will be:

- embedded in units of competency as part of the other performance requirements that make up the competency as a whole
- explicitly described within units of competency to enable Training Packages users to identify accurately the performance requirements of each unit with regards to Employability Skills.

This Training Package also seeks to ensure that Employability Skills are well-defined and written into units of competency so that they are apparent, clear and can be delivered and assessed as an essential component of unit work outcomes.

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The following table contains examples of embedded Employability Skills for each component of a unit of competency. Please note that in the examples below the bracketed skills are provided only for clarification and will not be present in units of competency within this Training Package.

Example Employability Skills unit

Unit component	**Example of embedded Employability Skill**
Unit Title	Manage operational plan (planning and organising, self management).
Unit Descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and monitor implementation of the operational plan to provide efficient and effective workplace practices within the organisation's productivity and profitability plans. Management at a strategic level requires systems and procedures to be developed and implemented to facilitate the organisation's operational plan (planning and organising, self management, problem solving, initiative and enterprise).
Element	Monitor and review operational performance (communication, problem solving)
Performance Criteria	**Plan and implement systems to ensure that mentoring and coaching are provided to support individuals and teams to effectively, economically and safely use resources (planning and organising, communication, team work, learning).**

Range Statement	Consultation processes may refer to: • **email/intranet communications, newsletters or other processes and devices which ensure that all employees have the opportunity to contribute to team and individual operational plans (technology, communication)**
Required Skills and Knowledge	• **literacy skills to access and use workplace information and to write a succinct and practical plan** • **technology skills to use software to produce and monitor the plan against performance indicators** • **planning and organisational skills** • **coaching skills to work with people with poor performance**

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	• **numeracy skills to allocate and manage financial resources (communication, technology, planning and organising, learning).**
Evidence Guide	Evidence of the following is essential: • **development of an operational plan with details of how it will be implemented and monitored** • **knowledge of models and methods for operational plans (self management, communication, problem solving, initiative and enterprise, planning and organising, self management).**

Competency Standards - Industry Contextualisation

RTOs may contextualise units of competency to reflect local outcomes required. Contextualisation could involve additions or amendments to the unit of competency to suit particular delivery methods, learner profiles, specific enterprise equipment requirements, or to otherwise meet local needs. However, the integrity of the overall intended outcome of the unit of competency must be maintained.

Any contextualisation of units of competency in this endorsed Training Package must be within the bounds of the following advice. In contextualising units of competency, RTOs:

- must not remove or add to the number and content of elements and performance criteria
- may add specific industry terminology to performance criteria where this does not distort or narrow the competency outcomes
- may make amendments and additions to the range statement as long as such changes do not diminish the breadth of application of the competency and reduce its portability
- may add detail to the evidence guide in areas such as the critical aspects of evidence or resources and infrastructure required where these expand the breadth of the competency but do not limit its use.
-

Employability Skills

Employability Skills replacing key competency information from 2006

In May 2005, the approach to incorporate employability skills within Training Package qualifications and units of competency was endorsed. As a result, from 2006 employability skills have replaced key competency information in Training Packages.

Background to employability skills

Employability skills are also sometimes referred to as generic skills, capabilities or key competencies. The employability skills discussed here build on the Mayer Committee's key competencies, which were developed in 1992 and attempted to describe generic competencies for effective participation in work.

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The Business Council of Australia (BCA) and the Australian Chamber of Commerce and Industry (ACCI), produced the Employability Skills for the Future report in 2002 in consultation with other peak employer bodies and with funding provided by the Department of Education, Science and Training (DEST) and the Australian National Training Authority (ANTA). Officially released in 2002, copies of the report are available from the DEST website at: *www.dest.gov.au/archive/ty/publications/ employability_skills/index.htm.*

The report indicated that business and industry now require a broader range of skills than the Mayer Key Competencies Framework and featured an Employability Skills Framework identifying the following eight employability skills:

- Communication
- Teamwork
- Problem solving
- Initiative and enterprise
- Planning and organising
- Self-management
- Learning
- Technology.

The report demonstrated how employability skills can be further described for particular occupational and industry contexts by sets of facets. The facets listed in the report are the aspects of the employability skills that the sample of employers surveyed identified as being important work skills. These facets were seen by employers as being dependent both in their nature and priority on an enterprise's business activity.

Employability Skills Framework

The following table contains the employability skills facets identified in the report Employability Skills for the Future.

Skill	**Facets**
	Aspects of the skill that employers identify as important. The nature and application of these facets will vary depending on industry and job type.
Communication that contributes to productive and harmonious relations across employees and customers:	• listening and understanding • speaking clearly and directly • writing to the needs of the audience • negotiating responsively • reading independently • empathising • using numeracy effectively • understanding the needs of internal and external customers • persuading effectively • establishing and using networks

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Skill	Facets
	Aspects of the skill that employers identify as important. The nature and application of these facets will vary depending on industry and job type.
	• being assertive • sharing information • speaking and writing in languages other than English.
Teamwork that contributes to productive working relationships and outcomes:	• working across different ages irrespective of gender, race, religion or political persuasion • working as an individual and as a member of a team • knowing how to define a role as part of the team • applying teamwork to a range of situations, e.g. future planning and crisis problem solving • identifying the strengths of team members • coaching and mentoring skills, including giving feedback.
Problem solving that contributes to productive outcomes:	• developing creative, innovative and practical solutions • showing independence and initiative in identifying and solving problems • solving problems in teams • applying a range of strategies to problem solving • using mathematics, including budgeting and financial management to solve problems • applying problem solving strategies across a range of areas • testing assumptions, taking into account the context of data and circumstances • resolving customer concerns in relation to complex project issues.
Initiative and enterprise that contribute to innovative outcomes:	• adapting to new situations • developing a strategic, creative and long-term vision • being creative • identifying opportunities not obvious to others • translating ideas into action • generating a range of options • initiating innovative solutions.
Planning and organising that contribute to long and short-term strategic planning:	• managing time and priorities – setting time lines, coordinating tasks for self and with others • being resourceful • taking initiative and making decisions • adapting resource allocations to cope with contingencies • establishing clear project goals and deliverables

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Skill	Facets
	Aspects of the skill that employers identify as important. The nature and application of these facets will vary depending on industry and job type.
	• allocating people and other resources to tasks • planning the use of resources, including time management • participating in continuous improvement and planning processes • developing a vision and a proactive plan to accompany it • predicting – weighing up risk, evaluating alternatives and applying evaluation criteria • collecting, analysing and organising information • understanding basic business systems and their relationships.
Self-management that contributes to employee satisfaction and growth:	• having a personal vision and goals • evaluating and monitoring own performance • having knowledge and confidence in own ideas and visions • articulating own ideas and visions • taking responsibility.
Learning that contributes to ongoing improvement and expansion in employee and company operations and outcomes:	• managing own learning • contributing to the learning community at the workplace • using a range of mediums to learn – mentoring, peer support and networking, IT and courses • applying learning to technical issues (e.g. learning about products) and people issues (e.g. interpersonal and cultural aspects of work) • having enthusiasm for ongoing learning • being willing to learn in any setting – on and off the job • being open to new ideas and techniques • being prepared to invest time and effort in learning new skills • acknowledging the need to learn in order to accommodate change.
Technology that contributes to the effective carrying out of tasks:	• having a range of basic IT skills • applying IT as a management tool • using IT to organise data • being willing to learn new IT skills • having the OHS knowledge to apply technology • having the appropriate physical capacity.

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Employability Skills summary

An employability skills summary is included for each qualification. Summaries provide a lens through which to view employability skills at the qualification level and capture the key aspects or facets of the employability skills that are important to the job roles covered by the qualification. Summaries are designed to assist trainers and assessors to identify and include important industry application of employability skills in learning and assessment strategies.

The following is important information for trainers and assessors about employability skills summaries:

- Employability skills summaries provide examples of how each skill is applicable to the job roles covered by the qualification.
- Employability skills summaries contain general information about the industry context which is further explained as measurable outcomes of performance in the units of competency in each qualification.
- The detail in each employability skills summary will vary depending on the range of job roles covered by the qualification in question.
- Employability skills summaries are not exhaustive lists of qualification requirements or checklists of performance (which are separate assessment tools that should be designed by trainers and assessors after analysis at the unit level).
- Employability skills summaries contain information that may also assist in building learners' understanding of industry and workplace expectations.
-

Assessment Guidelines

Introduction

These Assessment Guidelines provide the endorsed framework for assessment of units of competency in this Training Package. They are designed to ensure that assessment is consistent with the *Australian Quality Training Framework (AQTF) Essential Standards for Initial and Continuing Registration*. Assessments against the units of competency in this Training Package must be carried out in accordance with these Assessment Guidelines.

Assessment System Overview

This section provides an overview of the requirements for assessment when using this Training Package, including a summary of the AQTF 2007 requirements; licensing/registration requirements; and assessment pathways.

Quality assessment underpins the credibility of the vocational education and training sector. The Assessment Guidelines of a Training Package are an important tool in supporting quality assessment.

Assessment within the National Skills Framework is the process of collecting evidence and making judgements about whether competency has been achieved to confirm whether an individual can perform to the standards expected in the workplace, as expressed in the relevant endorsed unit of competency.

Assessment must be carried out in accordance with the:

- benchmarks for assessment

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- specific industry requirements
- principles of assessment
- rules of evidence
- assessment requirements set out in the AQTF

Benchmarks for Assessment

The endorsed units of competency in this Training Package are the benchmarks for assessment. As such, they provide the basis for nationally recognised Australian Qualifications Framework (AQF) qualifications and Statements of Attainment issued by Registered Training Organisations (RTOs).

Principles of Assessment

All assessments carried out by RTOs are required to demonstrate compliance with the principles of assessment:

- validity
- reliability
- flexibility
- fairness
- sufficiency

These principles must be addressed in the:

design, establishment and management of the assessment system for this Training

Package development of assessment tools, and the conduct of assessment.

Validity

Assessment is valid when the process is sound and assesses what it claims to assess. Validity requires that:

(a)	assessment against the units of competency must cover the broad range of skills and knowledge that are essential to competent performance
(b)	assessment of knowledge and skills must be integrated with their practical application
(c)	judgement of competence must be based on sufficient evidence (that is, evidence gathered on a number of occasions and in a range of contexts using different assessment methods). The specific evidence requirements of each unit of competency provide advice on sufficiency

Reliability

Reliability refers to the degree to which evidence presented for assessment is consistently interpreted and results in consistent assessment outcomes. Reliability requires the assessor to have the required competencies in assessment and relevant vocational competencies (or to assess in conjunction with someone who has the vocational competencies). It can only be achieved when assessors share a common interpretation of the assessment requirements of the unit(s) being assessed.

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Flexibility

To be flexible, assessment should reflect the candidate"s needs; provide for recognition of competencies no matter how, where or when they have been acquired; draw on a range of methods appropriate to the context, competency and the candidate; and support continuous competency development.

Fairness

Fairness in assessment requires consideration of the individual candidate"s needs and characteristics, and any reasonable adjustments that need to be applied to take account of them. It requires clear communication between the assessor and the candidate to ensure that the candidate is fully informed about, understands and is able to participate in, the assessment process, and agrees that the process is appropriate. It also includes an

opportunity for the person being assessed to challenge the result of the assessment and to be reassessed if necessary.

Sufficiency

Sufficiency relates to the quality and quantity of evidence assessed. It requires collection of enough appropriate evidence to ensure that all aspects of competency have been satisfied and that competency can be demonstrated repeatedly. Supplementary sources of evidence may be necessary. The specific evidence requirements of each unit of competency provide advice on sufficiency. Sufficiency is also one of the rules of evidence.

Rules of Evidence

The rules of evidence guide the collection of evidence that address the principles of validity and reliability, guiding the collection of evidence to ensure that it is valid, sufficient, current and authentic.

Valid

Valid evidence must relate directly to the requirements of the unit of competency. In ensuring evidence is valid, assessors must ensure that the evidence collected supports demonstration of the outcomes and performance requirements of the unit of competency together with the knowledge and skills necessary for competent performance. Valid evidence must encapsulate the breadth and depth of the unit of competency, which will necessitate using a number of different assessment methods.

Sufficient

Sufficiency relates to the quality and quantity of evidence assessed. It requires collection of enough appropriate evidence to ensure that all aspects of competency have been satisfied and that competency can be demonstrated repeatedly. Supplementary sources of evidence may be necessary. The specific evidence requirements of each unit of competency provide advice on sufficiency.

Current

In assessment, currency relates to the age of the evidence presented by a candidate to demonstrate that they are still competent. Competency requires demonstration of current performance, so the evidence collected must be from either the present or the very recent past.

Authentic

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To accept evidence as authentic, an assessor must be assured that the evidence presented for assessment is the candidate"s own work.

Assessment Requirements of the Australian Quality Training Framework

Assessment leading to nationally recognised AQF qualifications and Statements of Attainment in the vocational education and training sector must meet the requirements of the AQTF as expressed in the AQTF 2010 *Essential Standards for Registration.*

The AQTF 2010 *Essential Standards for Initial and Continuing Registration* can be downloaded from < www.training.com.au>.

The following points summarise the assessment requirements.

Registration of Training Organisations

Assessment must be conducted by, or on behalf of, an RTO formally registered by a State or Territory Registering Body in accordance with the AQTF The RTO must have the specific units of competency and/or AQF qualifications on its scope of registration.

Quality Training and Assessment

Each RTO must provide quality training and assessment across all its operations. See the

AQTF 2010 *Essential Standards for Initial and Continuing Registration*, Standard 1.

Assessor Competency Requirements

Each person involved in training, assessment or client service must be competent for the functions they perform. AQTF 2010 *Essential Standards for Initial and Continuing Registration*, Standard 1 for assessor (and trainer) competency requirements. See also the AQTF 2010 *Users" Guide to the Essential Standards for Registration* Appendix 2.

Assessment Requirements

The RTOs assessments, including RPL, must meet the requirements of the relevant endorsed Training Package. See the AQTF 2010 *Essential Standards for Initial and Continuing Registration*.

Assessment Strategies

Each RTO must have strategies for training and assessment that meet the requirements of the relevant Training Package or accredited course and are developed in consultation with industry stakeholders. See the AQTF 2010 *Essential Standards for Initial and Continuing Registration*.

National Recognition

Each RTO must recognise the AQF qualifications and Statements of Attainment issued by any other RTO. See the AQTF 2010 *Essential Standards for Initial and Continuing Registration*.

Access and Equity and Client Outcomes

Each RTO must adhere to the principles of access and equity and maximise outcomes for its clients. See the AQTF 2010 *Essential Standards for Initial and Continuing Registration*.

Monitoring Assessments

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Training and/or assessment provided on behalf of the RTO must be monitored to ensure that it is in accordance with all aspects of the AQTF 2010 *Essential Standards for Initial and Continuing Registration*.

Recording Assessment Outcomes

Each RTO must manage records to ensure their accuracy and integrity. See the AQTF 2010

Essential Standards for Initial and Continuing Registration.

Issuing AQF Qualifications and Statements of Attainment

Each RTO must issue AQF qualifications and Statements of Attainment that meet the requirements of the current AQF Implementation Handbook and the endorsed Training Packages within the scope of its registration. An AQF qualification is issued once the full requirements for a qualification, as specified in the nationally endorsed Training Package are met. A Statement of Attainment is issued when an individual has completed one or more units of competency from nationally recognised qualification(s)/courses(s). See the AQTF and the edition of the AQF Implementation Handbook-available on the AQF Council website < www.aqf.edu.au>.

Licensing/Registration Requirements

This section provides information on licensing/registration requirements for BSB07 Business Services Training Package, with the following important disclaimer.

The developers of this Training Package, and DEEWR, consider that no licensing or registration requirements apply to registered training organisations (RTOs), assessors or candidates with respect to this Training Package. Contact the relevant state or territory department(s) to check if there are any licensing or registration requirements with which you must comply. For further information on this topic contact IBSA at www.ibsa.org.au.

Requirements for Assessors

This section outlines the requirements and responsibilities of assessors assessing qualifications and units of competency in BSB07, including:

- vocational competency requirements
- responsibilities in making assessment judgements
- the need to maintain currency in assessment practice.

Competency requirements of assessors

The benchmarks for demonstration of this vocational competence are the relevant units of competency in BSB07 Business Services Training Package or equivalent competence.

Persons who conduct assessments against individual units of competency from BSB07 Business Services Training Package **must hold formal recognition of competence in each unit in which they wish to conduct assessment or be able to demonstrate equivalent competence.**

Responsibilities of assessors

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Assessors have significant responsibilities. Their judgement certifies that candidates have demonstrated competency to the standard required in the workplace.

In making the judgement of competence against BSB07 units of competency, assessors must evaluate the evidence and assess the risks. Constraints and pressures are widespread – time, cost, the demand for a quick outcome – but compromise and diminution of unit requirements are not viable options. Faithful adherence to the content and intent of the Training Package in the assessment process is critical.

Maintaining currency

An important aspect of maintaining competence in training and assessment is the currency of competence. Assessors have a responsibility to maintain currency in all areas of their own vocational competence.

Moy (2001) defines industry currency as maintaining, upgrading and if required, widening competence in the specialised industry skills and knowledge needed to deliver and assess vocational education and training (VET) courses.

Currency also includes maintaining professional knowledge about the industry sector, including technologies and workplace practices. This may be achieved through:

- attendance at relevant professional development activities
- participation in networks, communities of practices or mentoring activities
- personal development through reading of industry journals.
-

Requirements for RTOs

Because of the potentially sensitive nature of some of the cultural information covered in the Certificate IV in Business (Governance) and the Diploma of Business (Governance) particular care should be taken when choosing an appropriately qualified and suitable person or persons to deliver and undertake assessment in these qualifications.

Pathways

The competencies in this Training Package may be attained in a number of ways including through:

- formal or informal education and training
- experiences in the workplace
- general life experience, and/or
- any combination of the above.

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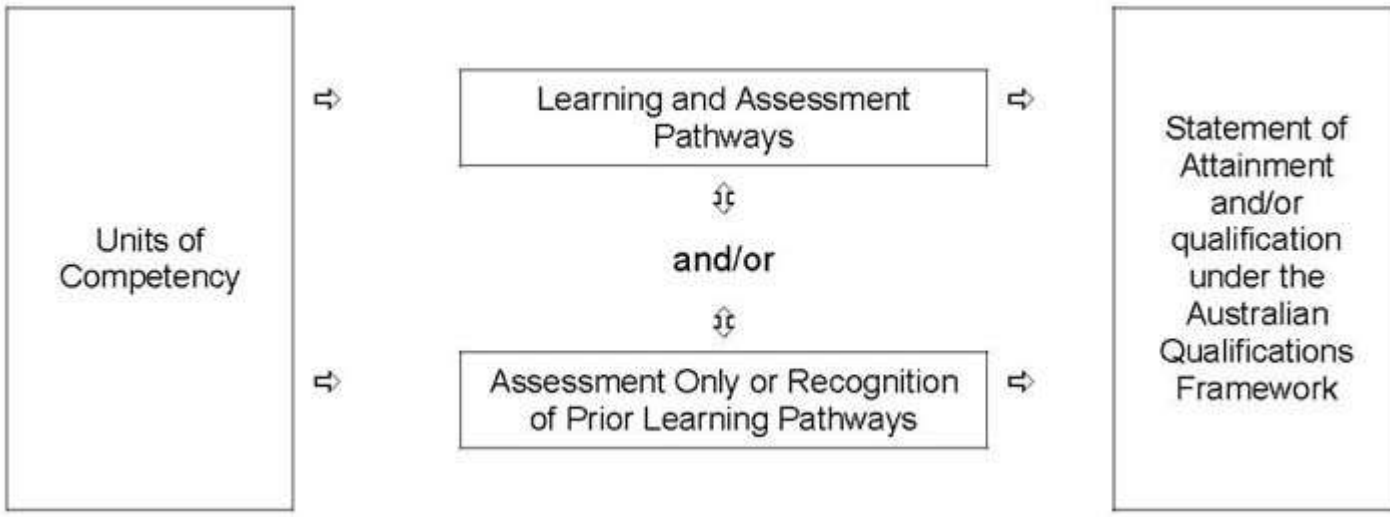
Assessment under this Training Package leading to an AQF qualification or Statement of Attainment may follow a learning and assessment pathway, an assessment-only or recognition pathway, or a combination of the two as illustrated in the following diagram.



Each of these assessment pathways leads to full recognition of competencies held - the critical issue is that the candidate is competent, not how the competency was acquired.

Assessment, by any pathway, must comply with the assessment requirements set out in the Assessment Guidelines of the Training Package, and the AQTF, 2 where relevant, the Australian Qualifications Framework.

Learning and Assessment Pathways

Usually, learning and assessment are integrated, with assessment evidence being collected and feedback provided to the candidate at anytime throughout the learning and assessment process.

Learning and assessment pathways may include structured programs in a variety of contexts using a range of strategies to meet different learner needs. Structured learning and assessment programs could be: group-based, work-based, project-based, self-paced, action learning-based; conducted by distance or e-learning; and/or involve practice and experience in the workplace.

Learning and assessment pathways to suit Australian Apprenticeships have a mix of formal structured training and structured workplace experience with formative assessment activities through which candidates can acquire and demonstrate skills and knowledge from the relevant units of competency.

Credit Pathways

Credit is the value assigned for the recognition of equivalence in content between different types of learning and/or qualifications which reduces the volume of learning required to achieve a qualification.

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Credit arrangements must be offered by all RTOs that offer Training Package qualifications. Each RTO must have a systematic institutional approach with clear, accessible and transparent policies and procedures.

Competencies already held by individuals can be formally assessed against the units of competency in this Training Package, and should be recognised regardless of how, when or where they were acquired, provided that the learning is relevant to the unit of competency outcomes.

Recognition of Prior Learning

Recognition of Prior Learning (RPL) is an assessment process which determines the credit outcomes of an individual application for credit.

The availability of Recognition of Prior Learning (RPL) provides all potential learners with access to credit opportunities.

The recognition of prior learning pathway is appropriate for candidates who have previously attained skills and knowledge and who, when enrolling in qualifications, seek to shorten the duration of their training and either continue or commence working. This may include the following groups of people:

existing workers; individuals with overseas qualifications; recent migrants with established work histories; people returning to the workplace; and people with disabilities or injuries requiring a change in career.

As with all assessment, RPL assessment should be undertaken by academic or teaching staff with expertise in the subject, content of skills area, as well as knowledge of and expertise in RPL assessment policies and procedures.

Assessment methods used for RPL should provide a range of ways for individuals to demonstrate that they have met the required outcomes and can be granted credit. These might include:

questioning (oral or written) consideration of a portfolio and review of contents consideration of third party reports and/or other documentation such as documentation such as articles, reports, project material, papers, testimonials or other products prepared by the RPL applicant that relate to the learning outcomes of the relevant qualification component mapping of learning outcomes from prior formal or non-formal learning to the relevant qualification components

observation of performance, and participation in structured assessment activities the individual would normally be required to undertake if they were enrolled in the qualification component/s.

In a Recognition of Prior Learning (RPL) pathway, the candidate provides current, quality evidence of their competency against the relevant unit of competency. This process may be directed by the candidate and verified by the assessor. Where the outcomes of this process indicate that the candidate is competent, structured training is not required. The RPL requirements of the AQTF must be met.

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As with all assessment, the assessor must be confident that the evidence indicates that the candidate is currently competent against the endorsed unit of competency. This evidence may take a variety of forms and might include certification, references from past employers, testimonials from clients, work samples and/or observation of the candidate. The onus is on candidates to provide sufficient evidence to satisfy assessors that they currently hold the relevant competencies. In judging evidence, the assessor must ensure that the evidence of prior learning is:

authentic (the candidate"s own work);

• alid (directly related to the current version of the relevant endorsed unit of competency);

r•eliable (shows that the candidate consistently meets the endorsed unit of competency);

c• urrent (reflects the candidate"s current capacity to perform the aspect of the work covered by the endorsed unit of competency); and

s• ufficient (covers the full range of elements in the relevant unit of competency and addresses the four dimensions of competency, namely task skills, task management skills, contingency management skills, and job/role environment skills).

Credit Transfer

Credit transfer is a process which provides learners with agreed and consistent credit outcomes based on equivalences in content between matched qualifications.

This process involves education institutions:

mapping, comparing and evaluating the extent to which the defined learning outcomes and

assessment requirements of the individual components of one qualification are equivalent to the learning outcomes and assessment requirements of the individual components of another qualification

making an educational judgment of the credit outcomes to be assigned between the

matched components of the two qualifications

setting out the agreed credit outcomes in a documented arrangement or agreement, and p• ublicising the arrangement/agreement and credit available.

Combination of Pathways

Credit may be awarded on the basis of a combination of credit transfer plus an individual RPL assessment for additional learning. Once credit has been awarded on the basis of RPL, subsequent credit transfer based on these learning outcomes should not include revisiting the RPL assessment but should be based on credit transfer or articulation or other arrangements between providers.

Where candidates for assessment have gained competencies through work and life experience and gaps in their competence are identified, or where they require training in new areas, a combination of pathways may be appropriate.

In such situations, the candidate may undertake an initial assessment to determine their current competency. Once current competency is identified, a structured learning and assessment program ensures that the candidate acquires the required additional competencies identified as gaps.

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Assessor Requirements

This section identifies the specific requirements on the vocational competence and

experience for assessors, to ensure that they meet the needs of industry and their obligations under AQTF, and clarifies how others may contribute to the assessment process where one person alone does not hold all the required competencies.

Assessor Competencies

The AQTF specifies mandatory competency requirements for assessors. For information, Element 1.4 from the AQTF 2007 *Essential Standards for Registration* follows:

1.4		Training and assessment is delivered by trainers and assessors who:
	a)	have the necessary training and assessment competencies as determined by the National Quality Council or its successors, and
	b)	have the relevant vocational competencies at least to the level being delivered or assessed, and
	c)	can demonstrate current industry skills directly relevant to the training/assessment being undertaken, and
	d)	continue developing their Vocational Education and Training (VET) knowledge and skills as well as their industry currency and trainer/assessor competence. * See AQTF 2010 *Users" Guide to the Essential Standards for Registration* Appendix 2

Designing Assessment Tools

This section provides an overview on the use and development of assessment tools.

Use of Assessment Tools

Assessment tools provide a means of collecting the evidence that assessors use in making judgments about whether candidates have achieved competency.

There is no set format or process for the design, production or development of assessment tools. Assessors may use prepared assessment tools, such as those specifically developed to support this Training Package, or they may develop their own.

Using Prepared Assessment Tools

If using prepared assessment tools, assessors should ensure these relate to the current version of the relevant unit of competency. The current unit of competency can be checked on the National Register < www.ntis.gov.au>.

Developing Assessment Tools

When developing assessment tools, assessors must ensure that they:

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- are benchmarked against the relevant unit or units of competency
- are reviewed as part of the continuous improvement of assessment strategies as required under Standard 1 of the AQTF 2007
- meet the assessment requirements expressed in Standard 1 of the AQTF 2010

Essential Standards for Initial and Continuing Registration.

A key reference for assessors developing assessment tools is TAE10 Training and Education Training Package.

Language, Literacy and Numeracy

The design of assessment tools must reflect the language, literacy and numeracy competencies required for the performance of a task in the workplace and not exceed these expectations.

Conducting Assessment

This section details the mandatory assessment requirements and provides information on equity in assessment including reasonable adjustment.

Mandatory Assessment Requirements

Assessments must meet the criteria set out in the 2010 *Essential Standards for Initial and Continuing Registration*. For information, the mandatory assessment requirements from Standard 1 from the AQTF 2010 *Essential Standards for Initial and Continuing Registration* are as follows:

1.5		Assessment, including Recognition of Prior Learning:
	a)	meets the requirements of the relevant Training Package or accredited course,
	b)	is conducted in accordance with the principles of assessment and the rules of evidence, and
	c)	meets workplace and, where relevant, regulatory requirements.
	d)	is systematically validated.

Assessment of Employability Skills

Employability Skills are integral to workplace competency. As such they must be considered in the design, customisation, delivery and assessment of vocational education and training programs in an integrated and holistic way, as represented diagrammatically below.

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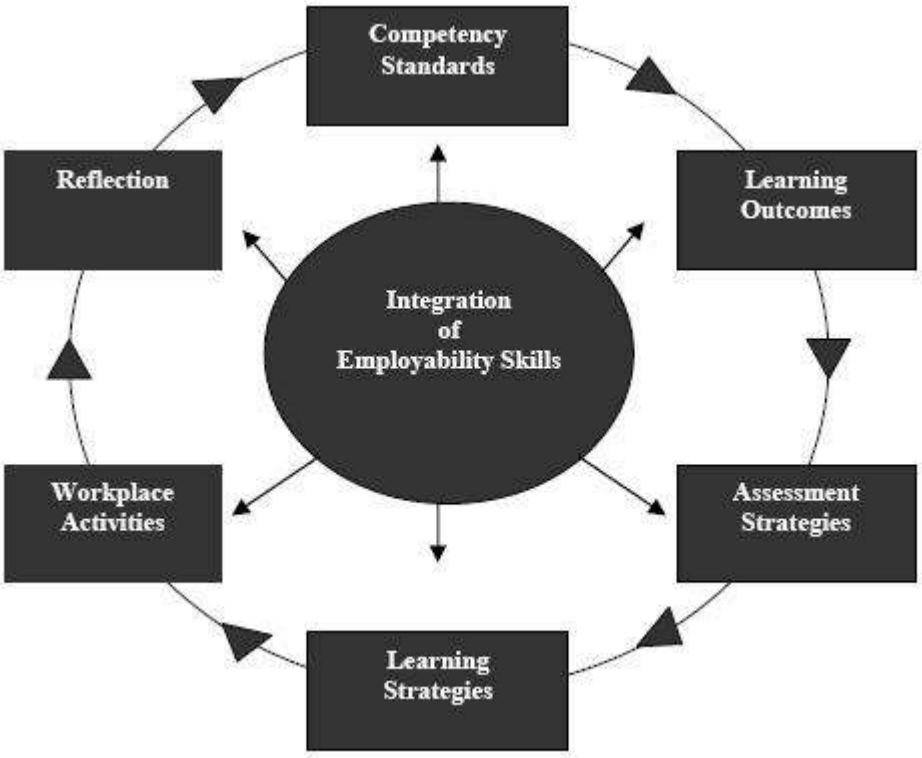

Employability Skills are embedded and explicit within each unit of competency, and an Employability Skills Summary is available for each qualification. Training providers must use Employability Skills information in order to design valid and reliable training and assessment strategies. This analysis could include:

- reviewing units of competency to locate relevant Employability Skills and determine how they are applied within the unit
- analysing the Employability Skills Summary for the qualification in which the unit or units are packaged to help clarify relevant industry and workplace contexts and the

application of Employability Skills at that qualification outcome

- designing training and assessment to address Employability Skills requirements.

Employability Skills in the Business Services Training Package context

BSB07 Business Services Training Package seeks to ensure that industry-endorsed employability skills are explicitly embedded in units of competency. The application of each skill and the level of detail included in each part of the unit will vary according to industry requirements and the nature of the unit of competency.

Employability skills are both explicit and embedded within units of competency. This means that employability skills are:

- embedded in units of competency as part of the other performance requirements that make up the competency as a whole

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- explicitly described within units of competency to enable Training Package users to identify accurately the performance requirements of each unit with regard to employability skills.

The National Quality Council has endorsed a model for assessing and reporting Employability Skills, which contains further suggestions about good practice strategies in teaching, assessing, learning and reporting Employability Skills. The model is available from < http://www.training.com.au/>.

The endorsed approach includes learners downloading qualification specific Employability Skills Summaries for Training Package qualifications from an online repository at < http://employabilityskills.training.com.au>

For more information on Employability Skills in Innovation and Business Industry Skills Council Training Packages go to the Innovation and Business Industry Skills Council website at http://www.ibsa.org.au.

Employability Skills are reported on each qualification using the following statement on the qualification testamur: "A summary of the Employability Skills developed through this qualification can be downloaded from http://employabilityskills.training.com.au "

Access and Equity

An individual"s access to the assessment process should not be adversely affected by restrictions placed on the location or context of assessment beyond the requirements specified in this Training Package: training and assessment must be bias-free.

Under the rules for their development, Training Packages must reflect and cater for the increasing diversity of Australia"s VET clients and Australia"s current and future workforce. The flexibilities offered by Training Packages should enhance opportunities and potential outcomes for all people so that we can all benefit from a wider national skills base and a shared contribution to Australia"s economic development and social and cultural life.

Reasonable adjustments

It is important that education providers take meaningful, transparent and reasonable steps to consult, consider and implement reasonable adjustments for students with disability.

Under the *Disability Standards for Education 2005*, education providers must make reasonable adjustments for people with disability to the maximum extent that those adjustments do not cause that provider unjustifiable hardship. While "reasonable adjustment" and "unjustifiable hardship" are different concepts and involve different considerations, they both seek to strike a balance between the interests of education providers and the interests of students with and without disability.

An adjustment is any measure or action that a student requires because of their disability, and which has the effect of assisting the student to access and participate in education and training on the same basis as students without a disability. An adjustment is reasonable if it achieves this purpose while taking into account factors such as the nature of the student"s disability, the views of the student, the potential effect of the adjustment on the student and others who might be affected, and the costs and benefits of making the adjustment.

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An education provider is also entitled to maintain the academic integrity of a course or program and to consider the requirements or components that are inherent or essential to its nature when assessing whether an adjustment is reasonable. There may be more than one adjustment that is reasonable in a given set of circumstances; education providers are required to make adjustments that are reasonable and that do not cause them unjustifiable hardship.

The Training Package Guidelines provides more information on reasonable adjustment, including examples of adjustments. Go to http://www.deewr.gov.au/tpdh/Pages/home.aspx.

Further Sources of Information

The section provides a listing of useful contacts and resources to assist assessors in planning, designing, conducting and reviewing of assessments against this Training Package.

Contacts

This section provides a list of useful contacts and resources to assist trainers and assessors in planning, designing, conducting and reviewing their programs for this Training Package.

Innovation and Business Skills Australia
Level 11

176 Wellington Parade

East Melbourne Vic 3002
Tel: 03 9815 7000
Fax: 03 9815 7001
Web: www.ibsa.org.au
Email: reception@ibsa.org.au

Technical and Vocational Education and Training (TVET) Australia Limited

Level 21, 390 St Kilda Road, Melbourne VIC 3150

PO Box 12211, A'Beckett Street Post Office

Melbourne VICTORIA 8006

Tel: 03 9832 8100

Fax: 03 9832 8198

Email: sales@tvetaustralia.com.au

Web: www.tvetaustralia.com.au

For information on the TAA04 Training and Assessment Training Package contact:

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Innovation and Business Skills Australia
Level 11

176 Wellington Parade

East Melbourne Vic 3002
Tel: 03 9815 7000
Fax: 03 9815 7001
Web: www.ibsa.org.au
Email: reception@ibsa.org.au

General resources

Refer to http://antapubs.dest.gov.au/publications/search.asp to locate the following publications.

AQF Implementation Handbook, third edition. Australian Qualifications Framework Advisory Board, 2002, www.aqf.edu.au.

Australian Quality Training Framework 2007 (AQTF 2007) - for information and resources go to <www.training.com.au/aqtf2007>.

AQTF 2007 *Essential Standards for Registration*. Training organisations must meet these standards in order to deliver and assess nationally recognised training and issue nationally recognised qualifications. They include three standards, a requirement for registered training organisations to gather information on their performance against three quality indicators, and nine conditions of registration.

AQTF 2007 *User's Guide to the Essential Standards for Registration*. A Users' Guide for training organisations who must meet these standards in order to deliver and assess nationally recognised training and issue nationally recognised qualifications.

AQTF 2007 *Standards for Accredited Courses*. State and territory accrediting bodies are responsible for accrediting courses. This standard provides a national operating framework and template for the accreditation of courses.

TAA04 Training and Assessment Training Package. This is available from Innovation and Business Skills Australia (IBSA), the Innovation and Business Industry Skills Council, and can be viewed and components downloaded, from the National Training Information Service (NTIS).

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National Training Information Service, an electronic database providing comprehensive information about RTOs, Training Packages and accredited courses (www.ntis.gov.au).

Training Package Development Handbook (DEST, August 2007). Can be downloaded from www.deeewr.gov.au.

Assessment resources

Training Package Assessment Guides – a range of resources to assist RTOs in developing Training Package assessment materials (originally developed by ANTA with funding from the Department of Education, Training and Youth Affairs) and made up of 10 separate titles, as described at the publications page of www.deewr.gov.au. Go to www.resourcegenerator.gov.au.

Printed and/or CD versions of the guides can be purchased from Technical and Vocational Education and Training (TVET) Australia Limited. The resource includes the following guides:

- Training Package Assessment Materials Kit
- Assessing Competencies in Higher Qualifications
- Recognition Resource
- Kit to Support Assessor Training
- Candidates Kit: Guide to Assessment in New Apprenticeships
- Assessment Approaches for Small Workplaces
- Assessment Using Partnership Arrangements
- Strategies for ensuring Consistency in Assessment
- Networking for Assessors
- Quality Assurance Guide for Assessment.

An additional guide ‘Delivery and Assessment Strategies’ has been developed to complement these resources.

Assessment tool design and conducting assessment

VETASSESS and Western Australian Department of Training and Employment 2000, Designing Tests – Guidelines for designing knowledge based tests for Training Packages.

Vocational Education and Assessment Centre 1997, Designing Workplace Assessment Tools, A self-directed learning program, NSW TAFE.

Manufacturing Learning Australia 2000, Assessment Solutions, Australian Training Products, Melbourne.

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Support for employment, training and assessment of people with specific needs

Association of Competitive Employment (ACE) National Network

ACE represents agencies who deliver open employment services for people who have a disability.

PO Box 5198

Alphington VIC 3078

Tel: 03 9411 4033

Fax: 03 9411 4053

Email: info@acenational.org.au

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Website: www.acenational.org.au

Australian Disability Clearinghouse on Education and Training (ADCET)

ADECT provides information about inclusive post-secondary education and training teaching, learning and assessment strategies and support services for people who have a disability.

ADCET

Locked Bag 1335

Launceston TAS 7250

Tel: 03 6324 3787

Fax: 03 6324 3788

Website: www.adcet.edu.au

Australian Association of the Deaf

PO Box 1083

Stafford QLD 4053

Tel: 07 3357 8266

Fax: 07 3357 8377

TTY: 07 3357 8277

Email: aad@aad.org.au

Website: www.aad.org.au

Australian Federation of Deaf Societies

PO Box 1060

Parramatta NSW 2124

Tel: 02 8833 3615

Fax: 02 9893 8333

TTY: 02 9893 8858

Australian Federation of Disability Organisations

247 Flinders Lane

Melbourne VIC 3000

Tel: 03 9662 3324

Fax: 03 9662 3325

Email: office@afdo.org.au

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Website: www.afdo.org.au

Blind Citizens Australia

PO Box 24

Sunshine VIC 3020

Tel: 03 9372 6400

Fax: 03 9372 6466

TTY: 03 9372 9275

Freecall: 1800 033 660

Email: bca@bca.org.au

Website: www.bca.org.au

Brain Injury Australia

PO Box 82

Mawson ACT 2607

Tel: 02 6290 2253

Fax: 02 6290 2252

Email: bianational@apex.net.au

Carers Australia

PO Box 73

Deakin West ACT 2600

Tel: 02 6122 9900

Fax: 02 6122 9999

Email: caa@carersaustralia.com.au

Website: www.carersaustralia.com.au

Commonwealth Disability Services Program Contacts

www.facs.gov.au or by telephone:

ACT: 02 6274 5206

New South Wales: 02 263 3818

Northern Territory: 08 8946 3555

Queensland: 07 3360 2800

South Australia: 08 8236 6111

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Tasmania: 03 6221 1411

Victoria: 03 9285 8523

Western Australia: 08 9346 5311

Deafness Forum of Australia

The forum coordinates the annual National Hearing Awareness Week, held in the last complete week of August.

218 Northbourne Avenue

Braddon ACT 2612

Tel: 02 6262 7808

Fax: 02 6262 7810

TTY: 02 6262 7809

Email: info@deafnessforum.org.au

Website: www.deafnessforum.org.au

Website: www.hearingawareness.org.au

Mental Health Foundation Australia

270 Church Street

Richmond VIC 3121

Tel: 03 9427 0407

Fax: 03 9427 1294

Email: admin@mhfa.org.au

Website: www.mhfa.org.au

National Council on Intellectual Disability

PO Box 771

Mawson ACT 2607

Tel: 02 6296 4400

Fax: 02 6296 4488

Email: ncid@dice.org.au

Website: www.dice.org.au

National Ethnic Disability Alliance

PO Box 381

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Harris Park NSW 2150
Tel: 02 9687 8933
Fax: 02 9635 5355
TTY: 02 9687 6325
Website: www.neda.org.au

Physical Disability Council of Australia Ltd
PO Box 77
Northgate QLD 4013
Tel: 07 3267 1057
Fax: 07 3267 1733
Email: pdca@pdca.org.au
Website: www.pdca.org.au

SANE Australia
PO Box 226
South Melbourne VIC 3205
Tel: 03 9682 5933
Fax: 03 9682 5944
Freecall: 1800 18 SANE
Email: info@sane.org
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Email: mail@standards.org.au

Women with Disabilities Australia WWDA
PO Box 605
Rosny Park TAS 7018
Tel: 03 6244 8288
Fax: 03 6244 8255
Email: wwda@ozemail.com.au
Website: www.wwda.org.au

For information on the TAE10 Training and Education Training Package *contact: Innovation & Business Skills Australia*

Telephone: (03) 9815 7000

Facsimile: (03) 9815 7001

Email: virtual@ibsa.org.au

Web: www.ibsa.org.au

General Resources

AQF Implementation Handbook, Fourth Edition 2007. Australian Qualifications Framework

Advisory Board, 2002 < www.aqf.edu.au>

Australian Quality Training Framework (AQTF) and AQTF 2010 Users" Guide to the Essential Standards for Registration
http://www.training.com.au/pages/menuitem5cbe14d51b49dd34b225261017a62dbc.aspx

For general information and resources go to http://www.training.com.au/

The National Register is an electronic database providing comprehensive information about

RTOs, Training Packages and accredited courses - < www.ntis.gov.au>

The Training Package Development Handbook site provides National Quality Council policy for the development of Training Packages. The site also provides guidance material for the application of that policy, and other useful information and links.
http://www.deewr.gov.au/Skills/Overview/Policy/TPDH/Pages/main.aspx

Assessment Resources

Registered training organisations (RTOs) are at the forefront of vocational education and training (VET) in Australia. They translate the needs of industry into relevant, quality, client-focussed training and assessment.

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RTOs should strive for innovation in VET teaching and learning practices and develop highly flexible approaches to assessment which take cognisance of specific needs of learners, in order to improve delivery and outcomes of training.

Resources can be purchased or accessed from: TVET Australia provides an integrated service to enable users of the national training system to identify and acquire training materials, identify copyright requirements and enter licenses for use of that material consistent with the scope and direction of the NQC. http://www.productservices.tvetaustralia.com.au/

Appendices

Appendix A: Training and Assessment for People with Specific Needs

Disability Standards for Education were formed under the Disability Discrimination Act 1992 and were introduced in August 2005; they clarify the obligations of education and training providers to ensure that students who have a disability are able to access and participate in education without experiencing discrimination.

DEST provides further information in the *Disability Standards for Education 2005 Guidance Notes*, accessible via the DEST website (www.dest.gov.au/NR/rdonlyres/11D73DAB-5477 -42F2-AB39-BE2F5BD9BC04/15407/DisabilityStandards_GuidanceNotes_004_screen.pdf).

Good vocational education and training and assessment is often about making adjustments to what we do to meet the learning support needs of individuals. The information provided in this section is aimed at assisting teachers/trainers to meet the reasonable adjustment needs of people who have a disability.

According to the Australian Bureau of Statistics (ABS), 2003, *Survey of Disability, Ageing and Carers (SDAC)* in the section on education and employment:

'In 2003, one in four people (24%) aged 15–64 years with a profound or severe core-activity limitation, who were living in households, had completed Year 12. This compares to half (49%) of those without a disability. People with a profound or severe core-activity limitation were less likely to have completed a diploma or higher qualification (14%) than those without a disability (28%).'

Employment-related findings, for people aged 15–64 years living in households, from the ABS 2003 *SDAC* include:

- those with a profound level of core-activity limitation had a much lower labour force participation rate (15%) than people without a disability (81%)
- people with a disability who were employed were more likely to work part-time (37%) than those who were employed and did not have a disability (29%)
- people employed in agriculture, forestry and fishing (16%) had a relatively high disability rate

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compared to the overall rate for those employed (11%).'

Clearly there is much work still to be done to ensure people who have a disability are able to participate in vocational education and training and employment as fully as possible.

What is a disability?

A disability presents some impairment to everyday activity. Some people with a disability do not have any impairments resulting from their disability. For example, a person who has a hearing impairment which is compensated for by a hearing aid may function without any adjustments. While some people with a disability may have an impairment because of the environment, not the disability itself. For example, hearing loss can be accentuated in a room with loud, competing noise and poor acoustics.

A disability may affect or relate to a range of human functions including mobility, stamina, lifting ability, memory, vision, hearing, speech, comprehension and mood swings. This may be due to accidents, illness or birth.

According to the ABS 2003 *SDAC*:

'one in five people in Australia (3,958,300 or 20.0%) had a reported disability. This rate was much the same for males (19.8%) and females (20.1%). Disability was defined as any limitation, restriction or impairment, which has lasted, or is likely to last, for at least six months and restricts everyday activities. Examples range from hearing loss which requires the use of a hearing aid, to difficulty dressing due to arthritis, to advanced dementia requiring constant help and supervision.'

The ABS 2003 *SDAC* information also tells us that:

'15.2% (600 300) of people with a disability reported that the cause of their main health condition was accident or injury, 14% (557 300) that it was disease, illness or heredity, and 11% (423,500) that it was "working conditions, work or over-work".'

Health conditions can also be acquired through sporting accidents, repetitive or over-use (through regular or sporting activities), or the daily activities of life.

There are many resources available that provide information on how to adjust training and assessment for someone who has a disability; some of these are listed below.

Adjustments in training and assessment

An open mind, common sense and tailoring to individual circumstances will, as often as not, ensure individuals achieve the standards employers and training providers expect. Reasonable adjustments need only be that – reasonable. It is about identifying what adjustments might

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reasonably be made and how they may be put into place.

Training and assessment can be made more appropriate and fair for a person who has a disability through attitude, preparation and application.

Attitude

The attitude of others is often the greatest barrier for people who have a disability. While most people who have a disability will only ever require minor adjustments to ensure learning is positive, some will require additional support. There are many support agencies who can provide advice, however teachers/trainers may need to take additional time to ensure their teaching/training meets the learning support needs of the individual concerned.

Positive language creates an atmosphere of mutual respect, which is essential to learning. For example, using language that identifies learners as people rather than language that identifies them by one of their characteristics conveys that the person is more important than the characteristic, such as the difference between a ‘person who has an intellectual disability’ and an ‘intellectually disabled person’. A person who has an intellectual disability could also be identified by a range of equally important characteristics – height, age, sporting interests. However, the term ‘intellectually disabled person’ refers to the disability as the major, and often only, defining characteristic.

Preparation

It is important to identify any functional issues arising from the nature and extent of a person’s disability. This can usually be done by discussing such issues with the individual. In most cases, this consultation will identify reasonable adjustment needs which can be put into place. There are many simple things that teachers/trainers can do to make reasonable adjustments to enable individuals who have a disability to succeed in training and assessment. In some cases, professional support may be required.

Application

Once reasonable adjustments have been implemented it is important to monitor and evaluate what has been done to ensure the best environment for continuous learning because:

- adjustments may only need to be temporary – i.e. mechanisms may only need to be in place during an induction period or due to a temporary disability, in which case evaluation will ensure appropriateness without the need for ongoing monitoring
- adjustments may need reinforcing – when adjustments need to be ongoing, monitoring may reinforce patterns of behaviour in order for them to become ‘natural’
- adjustments may made need improving – where adjustments are ongoing or substantial, a commitment to continuous improvement is recommended through monitoring.

In most cases an informal discussion with the person concerned may be all that is necessary. However, should adjustments be substantial, or a learner not be acquiring competence at a

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reasonable rate, a more formal process may be required. This may include:

- performance indicators – training providers, learners and employers should have agreed indicators of performance which can be measured and monitored
- independent support – a third party independent of the training and/or assessment environment may need to be involved
- experimentation – if existing adjustments are not proving satisfactory, creative solutions may be needed
- continuing review – formal monitoring is encouraged if adjustments are changed or if substantial adjustments are necessary.

For further information on training and assessment for people with specific needs, the DEST website has information about the Disability Coordination Officer Programme, which 'provides information, co-ordination and referral services for people with a disability interested in or enrolled in post-school education and training' (www.dest.gov.au).

Reasonable adjustment

Below are some of the practical things that can be done as part of providing reasonable adjustment to learners with specific support needs to enable them to undertake training and assessment. Clearly, each case will be different and will need to be discussed with the person and in some cases expert help will be needed, at least in the initial stages.

Type of Disability	**Reasonable Adjustment**	
Acquired brain injury	Memory aids (posters, notes etc.) Reflective listening skills Stress minimisation Time and patience	
Hearing impairment	Audio loops for people using hearing aids Plain English documents Fire and alarm systems with flashing lights Sign language interpreters Telephone typewriters	
Intellectual disability	Additional time Assessment which is appropriate to the skill (i.e. avoiding written assessment for practical tasks) Mentors Plain English documents	

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	Practical learning sessions Repetition of learning exercises	
Mobility impairment	Access to aids such as for holding documents Adjustable tables Lifting limits Note taking support Oral rather than written presentations Personal computer Wheelchair access	
Psychiatric disability	Identification and avoidance of stresses Ongoing rather than formal assessments Reflective listening skills ‘Time-out’ breaks in assessment	
Speech impairment	Information summaries Stress minimisation Time and patience Written rather than verbal opportunities	
Vision impairment	Additional writing time for assignments/tests Audio tapes Braille translations Enlarged computer screen images Enlarged text and images Good lighting or reading lamps Guide dog provision Informing the person before moving furniture Voice synthesisers on computers	

Sources of support for employment, training and assessment

There are many sources of support in the employment, training and assessment of a person who has a disability; some of these are listed below.

Association of Competitive Employment (ACE) National Network

ACE represents agencies who deliver open employment services for people who have a disability.

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PO Box 5198
Alphington VIC 3078
Ph: (03) 9411 4033
Fax: (03) 9411 4053
Email: info@acenational.org.au
Website: www.acenational.org.au

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Fax: (03) 6324 3788
Website: www.adcet.edu.au

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PO Box 1083
Stafford QLD 4053
Ph: (07) 3357 8266
Fax: (07) 3357 8377
TTY: (07) 3357 8277
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Website: www.aad.org.au

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PO Box 1060
Parramatta NSW 2124
Ph: (02) 8833 3615
Fax: (02) 9893 8333
TTY: (02) 9893 8858

Australian Federation of Disability Organisations

247 Flinders Lane
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Fax: (03) 9662 3325
Email: office@afdo.org.au
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Blind Citizens Australia

PO Box 24
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Fax: (03) 9372 6466
TTY: (03) 9372 9275
Freecall: 1800 033 660

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Email: bca@bca.org.au
Website: www.bca.org.au

Brain Injury Australia

PO Box 82
Mawson ACT 2607
Ph: (02) 6290 2253
Fax: (02) 6290 2252
Email: bianational@apex.net.au

Carers Australia

PO Box 73
Deakin West ACT 2600
Ph: (02) 6122 9900
Fax: (02) 6122 9999
Email: caa@carersaustralia.com.au
Website: www.carersaustralia.com.au

Commonwealth Disability Services Program Contacts

http://www.facs.gov.au or by telephone:

ACT (02) 6274 5206
New South Wales (02) 263 3818
Northern Territory (08) 8946 3555
Queensland (07) 3360 2800
South Australia (08) 8236 6111
Tasmania (03) 6221 1411
Victoria (03) 9285 8523
Western Australia (08) 9346 5311

Deafness Forum of Australia

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TTY: (02) 6262 7809
Email: info@deafnessforum.org.au
Website: www.deafnessforum.org.au
Website: www.hearingawareness.org.au

Mental Health Foundation Australia

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Richmond VIC 3121
Ph: (03) 9427 0407
Fax: (03) 9427 1294
Email: admin@mhfa.org.au

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Website: www.mhfa.org.au

National Council on Intellectual Disability

PO Box 771
Mawson ACT 2607
Ph: (02) 6296 4400
Fax: (02) 6296 4488
Email: ncid@dice.org.au
Website: www.dice.org.au

National Ethnic Disability Alliance

PO Box 381
Harris Park NSW 2150
Ph: (02) 9687 8933
Fax: (02) 9635 5355
TTY: (02) 9687 6325
Website: www.neda.org.au

Physical Disability Council of Australia Ltd

PO Box 77
Northgate QLD 4013
Ph: (07) 3267 1057
Fax: (07) 3267 1733
Email: pdca@pdca.org.au
Website: www.pdca.org.au

SANE Australia

PO Box 226
South Melbourne VIC 3205
Ph: (03) 9682 5933
Fax: (03) 9682 5944
Freecall: 1800 18 SANE
Email: info@sane.org
Email: helpline@sane.org
Website: www.sane.org

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GPO Box 476
Sydney NSW 2001
Ph: (02) 8206 6000
Email: mail@standards.org.au
Website: www.standards.org.au

Women with Disabilities Australia (WWDA)

PO Box 605
Rosny Park TAS 7018
Ph: (03) 6244 8288
Fax: (03) 6244 8255
Email: wwda@ozemail.com.au
Website: www.wwda.org.au

Appendix B: Assessment for Indigenous Organisations

Aboriginal and Torres Strait Islander Aboriginal and Torres Strait Islander people have expressed concern about the importance of developing assessment processes along appropriate lines.

There are four main areas of concern:

- diversity
- cultural appropriateness
- community control
- accreditation.

Diversity

The term diversity is used to emphasise the wide range of opinion, aspirations, community circumstances, cultural practices, geographic locations, and social, economic and political conditions that exist throughout Australia and the need to guard against assumptions that all communities are the same.

One approach is to distinguish between remote, rural and urban settings. These settings suggest differences that may be relevant to Aboriginal and Torres Strait Islander organisations, including:

- culture
- language
- history
- social make up
- geography
- social and economic infrastructure
- economy
- political structure.

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These factors suggest that training and assessment, in order to be relevant to the needs of any particular Aboriginal and Torres Strait Islander organisation, should address each situation as unique.

Cultural appropriateness

The term culture is used in a broad sense, it refers to:

- values, social beliefs and customs e.g. Aboriginal and Torres Strait Islander law, land and family and kinship systems
- protocols of behaviour and interaction e.g. cultural authority, gender, kinship
- ways of thinking e.g. learning styles
- language, both traditional and Aboriginal English
- lifestyles
- local history
- location e.g. region and place.

A particularly important aspect of cultural appropriateness is that of learning styles. There is evidence that Aboriginal and Torres Strait Islander people, both traditional and contemporary, approach learning differently from the Western intellectual tradition, which is relevant to effective training and assessment.

It is understood that Aboriginal and Torres Strait Islander people may:

- learn better in groups than individually
- learn better in the surroundings of their community than in an institutional environment
- prefer oral communications to written forms
- learn on the basis of trial and error in the presence of an experienced person in preference to concept building approaches
- have a highly developed sense of spatial relations by which they learn; hence stories, maps and pictures would be preferable to oral explanations.

To be effective, it is necessary that training and assessment recognises, adopts and practises appropriate delivery and assessment approaches.

Non-Aboriginal and Torres Strait Islander trainers and assessors need information on aspects of Aboriginal and Torres Strait Islander culture. They need to work closely with Aboriginal and Torres Strait Islander people to adopt practices that reflect Aboriginal and Torres Strait Islander approaches. The community should be asked to identify experts to provide information and to assist with assessment of relevant protocols, for example, where required.

There are a number of ways a Registered Training Organisation (RTO) can establish and maintain culturally appropriate training and assessment practices, including:

- ensuring a high proportion of Aboriginal and Torres Strait Islander participation in all aspects of planning, development, delivery and evaluation
- establishing and maintaining a collaborative relationship with local Aboriginal and Torres Strait Islander communities
- as a mainstream (non-Indigenous) RTO, establishing auspice relationships with Aboriginal and

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Torres Strait Islander organisations and individuals, including direct and indirect involvement of persons identified as appropriate by the local community

- ensuring ongoing training of non-Aboriginal and Torres Strait Islander staff at all levels of the RTO, delivered by Aboriginal and Torres Strait Islander personnel.

Community control

The term community control is synonymous with self-determination, self-management, etc. and underpins most community aspirations. It is of fundamental concern to people who see themselves as having been dispossessed by colonisation.

The essence of control is control of decision-making. In order to be able to do this, people need all relevant information, relevant competencies and recognition of their own structures and processes.

Among other things, Aboriginal and Torres Strait Islander people seek control over their training. It is necessary, therefore, that they participate in all stages of planning, development, delivery and evaluation, in meaningful ways. One way is for communities to have control of the contract for training initiatives.

It is important that training providers and assessors respect and conform to the practice of community control which underpins this field within the BSB07 Business Services Training Package.

Accreditation

Aboriginal and Torres Strait Islander people have said for a long time that their involvement in training has not been formally recognised and that many of the skills they utilise in managing their organisations and delivering services to their communities have not been valued.

The first issue may have arisen because much of the training that has been delivered to communities has been customised to particular situations, has not been assessed on an individual basis if at all, and has been delivered by unregistered personnel.

Secondly, until this time, recognition of current competence (RCC) has been under-utilised.

Individuals may demonstrate competence in complete units of competency through formal training, informal training or the recognition of current competence/skills, resulting in qualifications/Statements of Attainment being awarded as appropriate.

In the community group setting, an important feature of likely relevance for assessment is that participants may vary with respect to previous education and training experience, and possess diverse skills in literacy and/or numeracy.

However, diverse numeracy and literacy skills are not a barrier to sophisticated thought, and care must be taken not to employ assessment strategies that rely on numeracy and literacy skills where they are not intrinsically required by the unit of competency being assessed.

A flexible approach to assessment will be required by RTOs in order to meet the requirements of Aboriginal and Torres Strait Islander organisations and individuals under this domain within the BSB07 Business Services Training Package.

Assessment in Aboriginal and Torres Strait Islander Communities

The guiding principles that underpin assessment include:

- assessment should be transparent i.e. clearly seen and understood by the candidate and others
- assessment should empower the candidate on the basis of consent, self-assessment and

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responsibility for the process
- any Board members or prospective Board members should have opportunities to demonstrate their competence/skills
- Board activities may be used as the context for assessment where possible (known as on-the-job assessment or workplace assessment); there may also be opportunities to include evidence from other relevant situations
- assessment should involve designated community experts working in collaboration with RTO assessors in order to provide appropriate recognition of cultural and community knowledge and skills
- assessments must provide constructive feedback to candidates and support for further competency development
- assessments must provide a Statement of Attainment or qualification listing the units of competency achieved
- records of candidate achievement maintained by the RTO must record the Statement of Attainment listing the units of competency achieved or qualifications achieved as required by the AQTF 2007
- a record of demonstrated competencies will assist in role clarification and performance appraisals in the workplace.

Given the importance of the assessment to the candidate and the Board, the assessor must make every effort to ensure that assessment is conducted with the highest level of professionalism and integrity.

Units of competency with a cultural content, including the following of local protocols, will require knowledge of these cultural matters by the assessor. As these matters are often governed by local rules of access to such knowledge, only those people with the knowledge can genuinely assess these aspects of the competency or provide guidance on their assessment.

Discussion must take place with the community and agreement reached on how these matters are assessed. For non-Aboriginal and Torres Strait Islander RTOs, this will usually mean the use of auspice arrangements with appropriate people or knowledge experts, identified by the community.

It should also be noted that for Aboriginal and Torres Strait Islander people being assessed, these aspects of competency will almost invariably have been attained through life experience. This must also be taken into account in the assessment procedures relating to cultural matters.

Assessors may exercise limited discretion in response to organisational or individual requirements, but any changes must not alter the meaning of the unit of competency or the elements of competency.

Candidates must be informed of the right to access grievance procedures.

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Appendix C: VET in Schools

What is VET in Schools?

VET in Schools provides for nationally recognised vocational education and training (VET) based on industry standards undertaken as part of a senior secondary certificate.

Successful completion of a VET in Schools program enables a student to gain a nationally recognised AQF qualification, usually at the same time as the school-based qualification.

How are VET in Schools programs structured?

VET in Schools programs are packaged and delivered in a variety of ways across Australia. There are three main types of delivery arrangements for VET in Schools programs:

- schools can be a Registered Training Organisation (RTO) in their own right
- school sectoral bodies (such as Boards of Studies or regional offices) can hold RTO status on behalf of a group of schools
- schools can work together in a partnership with an RTO.

States and territories across Australia package VET in Schools programs differently, according to their senior secondary certificate requirements. Generally schools may offer VET in Schools programs as:

- stand-alone
- embedded
- combination of stand-alone and embedded
- school-based New Apprenticeship.

Stand-alone refers to the delivery of a VET course or qualification outside of a school subject framework.

Embedding refers to an arrangement whereby VET units of competency are delivered within a general education course, producing both vocational and general education outcomes. This aims to minimise the assessment workload of students by avoiding unnecessary duplication. In some states and territories, embedding is necessary to provide recognition of VET within the senior secondary certificate. In others, stand-alone VET components contribute towards the senior secondary certificate.

Given the considerable variation in the manner in which qualifications and units of competency are used across Australia, the relevant authority in each state and territory will provide advice and guidance as to the specific VET in Schools programs that can be undertaken.

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Appropriate Qualifications for VET in Schools

IBSA acknowledges links between schools, businesses and the community, and strongly supports young people combining schooling with VET and workplace learning.

It is essential that all VET qualifications gained through a VET in Schools program are consistent with the outcomes detailed in the Training Package.

The AQTF 2007 Standards for Registered Training Organisations set out minimum competency standards for staff responsible for the delivery of training and the conducting of assessments; and they ensure that VET specialists have skills and competencies consistent with Training Package requirements. All schools using their own teachers for VET delivery must also be aware of the AQTF 2007 requirement for assessors to hold relevant vocational competencies, at least equal to that being delivered and assessed, in addition to teaching and assessment competence.

Schools that are RTOs generally deliver Certificate I and II qualifications. Some schools, in most states and territories, may also offer part or all of Certificate III and IV qualifications. However, the delivery of these higher qualifications often requires a partnership arrangement and presents some significant challenges as detailed below.

Schools are encouraged to establish partnerships with industry and effective work placement arrangements to maximise the quality of outcomes for students and industry alike. Recognition of competence gained through voluntary, part-time or vacation work not directly related to the industry focus of the qualification should also be considered.

Certificates I and II

Certificate I and Certificate II qualifications are the most suitable for use in VET in Schools programs. These qualifications are often preparatory in nature or include skills that can be readily trained and assessed in a school setting. For example, many of the units in Certificate I and II, Information Technology or Business qualifications describe skills that are considered foundation skills for any employment situation. However, even at this level, schools must ensure adequate attention is paid to the effective assessment of competencies dealing with work environment or Employability Skills.

Certificate III

The AQF descriptor for Certificate III qualifications includes performance expectations such as skills transference to new environments and the prospect of potential responsibility for others. A Certificate III qualification is premised on the understanding that it provides a vocational outcome in its own right and stretches beyond ‘preparation for work’. It may even reflect a trade outcome. Some Certificate III qualifications, or the units of competency packaged to make up the qualification.

For these reasons, effective learning and assessment in a completely institutional environment is extremely difficult to achieve. While some ‘technical’ skills may be effectively learnt and assessed in an appropriately structured, simulated environment, work environment-related competencies

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pose significant challenges. In these cases, Statements of Attainment for individual units are usually more appropriate than the award of full qualifications.

Certificate IV

At this AQF level, individuals need to demonstrate competence characterised by a degree of unpredictability, varying contexts, critical appraisal and management of diverse and perhaps questionable information and the assumption of responsibility for the quality and quantity of one's own work and often the work of others. Some Training Packages consider their Certificate IV graduates to be 'associate professionals and supervisors'.

It is highly unlikely that a full Certificate IV qualification could be achieved in a school environment, other than through a schools-based New Apprenticeship.

Work Placement

Work placement usually involves students spending an extended period of time in a workplace gaining experience and skills, and undergoing an assessment process related to the attainment of a qualification in a specific occupational field.

An essential feature of school–industry programs is that they involve students spending some time learning in a workplace. In recent years an increasing number of effective structured workplace learning programs have made significant progress towards greater workplace integrity for those industry training programs that are delivered predominantly off-the-job. The implementation of Training Packages means that structured workplace learning must be a consideration for all RTOs, not only schools, in the delivery of training programs.

Principles for quality workplace learning

The Ministerial Council on Employment, Education, Training and Youth Affairs (MCEETYA) endorsed the Principles for Quality Workplace Learning for school students engaged in VET programs throughout Australia. All states and territories apply the principles to their work placement programs although the nature and extent of work placement programs varies across states and territories.

The broad MCEETYA principles are documented below.

Quality workplace learning is integrated into a program

- It operates within a framework which provides the opportunity for all students to access it, though not all students may choose to do so; and
- It operates within the context of vocational courses, which are recognised by industry, are responsive to industry needs and forms part of a student's exit credential.

Quality workplace learning is structured

- It has a clearly articulated and documented purpose;
- There are clearly identified and documented learning outcomes for students within accredited programs, which are linked to post-school qualifications;
- They are of sufficient duration and depth to enable students to acquire a reasonable understanding of the enterprise/industry to demonstrate competence according to industry standards of at least level 1 of the AQF;
- There is a matching between the students' skills and interests and the work placements; and
- Students, teachers and employers are thoroughly prepared beforehand so that the expectations and outcomes of the work placement are clearly understood by all parties.

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Quality workplace learning is monitored

- The learning is coordinated by personnel with appropriate expertise and adequate resources; and
- Support should be made available to students and employers throughout the course of the work placement.

Quality workplace learning is regulated

There are clearly stated procedures designed to ensure that:

- Students are protected from moral and physical danger;
- Students work in a non-discriminatory and harassment free environment;
- Students receive appropriate training and instruction in occupational health and safety; and
- Students are not exploited by being continuously engaged in a production or service capacity or used to substitute for the employment of employees and payment of appropriate wages.
- The students are required to understand the roles and responsibilities of employees in the workplace and are expected to follow the directions of the workplace supervisors and the other employees.

Quality workplace learning is assessed

- The assessment, according to industry standards, is of students' competencies achieved in the workplace which contributes to the overall assessment of the program; and
- There are mechanisms for the recording and reporting of students' competencies.

There is a strong correlation between these MCEETYA quality principles and the OECD characteristics of high quality learning programs detailed below.

The major 14-country study entitled *From Initial Education to Working Life: Making Transitions Work* by the OECD identified 10 characteristics of high quality workplace learning programs. These are:

Work placements that are long enough for real learning to take place.

Systematic analysis of the training capacity of the workplace, to see what it can realistically supply.

A formal training plan, setting out what has to be taught and learned, and clarifying the work-based and school-based parts of a student's program.

Employer involvement in student selection for work placements.

The presence of a trained program coordinator, able to liaise between the school and the firm and troubleshoot when problems occur.

The use of qualified, highly competent workers as workplace trainers or mentors.

Regular face-to-face contact between the coordinators and employers and in-firm supervisors.

Monitoring of the students on the job by the program coordinator.

The evaluation of student performance against the training plan at the end of the placement, with the evaluation carried out by the job supervisor and coordinator jointly.

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Deliberate efforts by schools to relate what has been learned at work to students' school-based learning. (Source: OECD, 2000, *From Initial Education to Working Life: Making Transitions Work*. Organisation for Economic Cooperation and Development, Paris.)

Effective work placement is characterised by:

- activities that complement off-the-job learning programs
- clearly articulated and documented purpose
- development of appropriate attitudes towards work
- development of competence in designated industry skills and Employability Skills
- facility for on-the-job practice of skills acquired in a classroom
- flexibility
- learning in a range of behaviours appropriate to the relevant industry
- opportunities for work-based assessment
- regular and frequent use of current technology and equipment
- relevance to the VET qualification being undertaken
- recognition of student readiness
- support of industry partners.

Beyond the above, a number of other provisions are necessary for a successful work placement program. The credibility of work placements and any resultant recognition of competence requires a degree of 'seriousness' if the outcomes are to be valued by individuals and industry clients of the VET system.

It is suggested that stakeholders involved in the planning and management of work placements carefully consider and implement the following general principles:

That the RTO assume responsibility for finding placements and validating the arrangements.

That the workplace has the appropriate resources, tools and staff to conduct the placement with compliance to any legislative requirements.

That there be regular validation by the RTO that the student and assessor, where relevant, are operating according to RTO AQTF 2007 standards.

That a student on work placement must be covered by injury insurance.

That there is a formal contract setting out each party's responsibilities and obligations.

That, where possible, the workplace has on site a qualified workplace trainer and assessor in 'direct line' control of the student (to avoid training and assessment by 'proxy').

That if the placement is for assessment only then there must be clearly documented assessment tasks specifically related to the unit being assessed and evidence retained to support achievement of competence (for both best practice recording purposes and audit/appeal).

That if the placement also includes training then any 'academic pass' cannot be bestowed prior to the placement as clearly all of the learning components have not been undertaken nor can they be assessed in advance if they have not been learned.

That the training be directly related to achievement of competence while recognising the likely

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acquisition of other skills and knowledge.

That where assessment occurs it be clearly related to a unit of competency relevant to the work placement.

That where more than one performance criteria (possibly over more than one unit) is being assessed there must be a clearly linked and documented relationship between the assessment and the PC.

That the qualifications level be appropriate in context i.e. if it is advanced programming OO there must be an advanced OO programming task observed and assessed

That the actual variables of the PC be documented for audit purposes and for verification of appropriateness of the range in the work placement.

In some state and territory school systems, part-time student work in an appropriate workplace may be used to fulfil work placement requirements and virtual/simulated work placements may also be legitimate.

Appendix D: Assessment in a simulated environment

Units of Competency in the Business Services Training Package may be assessed in the workplace or in a simulated environment.

Assessment within a simulated environment may be required because:

- suitable employment and/or work experience is not always available
- some workplaces or work situations do not use or allow the application of the competency required
- conducting assessment within the workplace may be unacceptably disruptive to work requirements of the business
- it is sometimes appropriate to practice skills in live settings prior to the acquisition of competency, particularly in potentially dangerous situations or where valuable equipment may be at risk.

Given that simulation may be used and is often indicated as an option for assessment within the Business Services Training Package the following advice is provided:

In order to be valid and reliable, the simulation must closely represent what actually occurs in the workplace, and should seek to replicate an actual work setting. It is critical that the designer of the simulation is thoroughly familiar with the application of the competency and is experienced in current and relevant workplace practices. In deciding whether a simulation or an assessment environment has been adequately designed, the following questions should be asked:

Are there opportunities to:

- test the full range of equipment?

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- use up to date equipment and software?
- reflect time pressures and deadlines?
- show the complexity of dealing with multiple tasks?
- involve prioritising among competing tasks?
- deal with customers, including difficult ones?
- work with others in a team?
- communicate with diverse groups?
- find, discuss and test solutions to problems?
- explore health and safety issues?
- answer practically oriented, applied knowledge questions?
- show the level of written and verbal expression sufficient for, but not exceeding, the work requirements?

Appendix E: New Approaches to Units and Qualifications in IBSA Training Packages

The IBSA Perspective

IBSA industries directly employ 20% of the Australian workforce and contribute over one third of Australia's Gross Domestic Product.

Specialists from within IBSA sectors are employed everywhere – human resource managers, accountants, IT specialists, administrative personnel, trainers and assessors are employed in all industries. Blended occupations combine business and management skills with other industry specialisations. Individuals working in the IBSA cultural industry fuel our creative economy.

Sole traders	Continual creation of new industries	Technological convergence	Existing workers needing higher level skills	Global contexts
Diverse workers	Rapid change	Compliance	Outsourcing	Remote working
Blended occupations	Individual responsibility for developing and maintaining skills	Continually shifting business partnerships and alliances	Virtual enterprises	Knowledge workers
Mature workers have different skilling and recognition needs	Needs of entry level workers for full qualification			

These are the emerging features and trends within IBSA industries; what holds true for IBSA

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within its own industries is also true beyond its industry portfolio.

A detailed set of design principles has been created to facilitate a more cohesive development approach across IBSA's different sectors.

These are divided as follows:

- conceptual clarity
- rationalisation and what it really means
- qualification design
- skill set design
- unit design.

Conceptual Clarity

Issue	Guiding Principles
Nature of competence – fit between performance and outcomes as opposed to skills and knowledge	• content will be developed on the understanding that competence (and therefore units of competency) comprises a specification of knowledge and skill and the application of that knowledge and skill to the standard of performance required in the workplace • IBSA Training Packages acknowledge the importance of essential and pre-vocational skills and may therefore incorporate units that have no direct workplace outcome e.g. creative thinking units, financial literacy units • each component of a unit of competency will be considered as an integral part of the unit and of equal importance • each unit will be developed and checked to ensure it reflects the four components of competency: task skills, task management skills, contingency management skills, job/role environment skills
Nature of competence – transferability and context	• IBSA will pro-actively engage with the system to explore issues around transferable skills and transfer of learning, and how this might be encouraged and fostered in different industry sectors and delivery contexts • units will begin to articulate expectations in relation to transferability under the unit section 'Application of this unit'
Recognition	• content development will acknowledge the importance of respecting an individual's right to recognition with a separate unit of competency where the combination of skills, knowledge, performance and outcomes can be considered unique with no realistic expectation of skills transfer to different contexts • content development will acknowledge the need to provide

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	separate recognition of performance, skills and knowledge which hold a unique place in a given industry context due to factors such as: licensing or other regulation, accreditation, professional organisation membership, cultural considerations

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Rationalisation

Rationalisation and the reduction of unnecessary duplication is a national priority, though there is currently no agreed national definition of rationalisation. To provide clarity around this issue, IBSA has defined rationalisation as the re-structuring and streamlining of existing Training Package content to:

- reduce duplication within and between training products
- provide a cohesive and flexible set of national training products to meet the skill development needs of industry, the community and individuals.

Issue	Guiding Principles
Rationalisation purpose	• rationalisation initiatives will be based on clear evidence of benefits for users • benefits of rationalisation will be articulated and documented in the context of specific review and development work
Overall rationalisation approach	• primary focus of IBSA's rationalisation initiatives will be to identify commonalities across sectors, achieve better integration and reduce unnecessary duplication so that the new framework better reflects the changing nature of work

Rationalisation priorities	• focus of IBSA's short-term rationalisation efforts will be in key areas:
	  • existing units and qualifications
	  • units and qualifications which are the most widely used (based on NCVER and other data)
	  • Training Packages due for review
	  • new development
	  • units and qualifications that have the most potential for wide use to meet emerging needs (e.g. innovation, creativity, design)

Rationalisation across contexts	• focus of IBSA rationalisation across workplace contexts will be placed on units and qualifications where the following criteria apply:
	  • units, skill sets and qualifications covering priority skills areas where convergence is occurring and there is evidence-based demand for better integration (e.g. digital content)
	  • established or emerging pattern of career path movement across contexts

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	• use of broadly similar technologies in the application of skills • use of underpinning literacies which are broadly similar in nature, scope and level of importance to a given task • well-argued case around transferability of skills and knowledge between contexts • reasonable expectation of system in terms of capacity to deliver on transferable skills
Rationalisation across qualification levels	• starting point for review/development of units will be the identification of different skills, knowledge and outcomes with no assumption of a unit to fit every AQF level • development of units for packaging at different qualification levels will therefore depend on the identification of different skills, knowledge and outcomes • differentiation between units packaged at different qualification levels in the same skill area and the relationship between such units, will be clearly articulated in all unit components • individual units of competency have different degrees in terms of scope and complexity; IBSA development supports the position that it is qualifications which have AQF levels and not individual units of competency • qualification packaging rules will allow some units to be packaged across a range of AQF levels to provide appropriate flexibility

•

Qualification Design

Issue	**Guiding Principles**
Starting points for developing qualifications	• IBSA will construct brief but meaningful profiles from the Industry Skills Report (ISR) about emerging patterns of work, with these profiles forming the basis for qualification review and development • in the short-term absence of reliable ISR data, the research and analysis phase of unit and qualification review or development will place a much stronger emphasis on emerging industry trends and demand • developers will consider emerging patterns of work and provide clear justification and evidence of need for proposed qualification structures • developers will consider the benefits of developing qualifications based around function rather than specific industry context to better reflect emerging patterns of work • IBSA Training Packages will support and confirm the place of

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	qualifications that may reach beyond existing notions of 'occupational outcomes' to reflect broad and varied individual, community and industry needs
Overall approach to qualification structure	• flexibility and options will be a key feature of all qualifications to allow for ongoing change – restrictive 'rules' will be kept to a minimum • packaging of a qualification requires that elective units be selected from an equivalent level qualification unless otherwise stated

Qualification titling and specialisation	• qualifications will be developed around a broad understanding that national policy on qualification titling will become more flexible to allow the nomination of specialisations in brackets after the main qualification title
	• specialisations and requirements to achieve the specialisations, will be nominated within each qualification
	• nominated specialisations will be based on consultation around the following criteria:
	  • evidence-based established and emerging occupational outcomes, within and outside, traditional industry boundaries
	  • relevant links to accreditation or licensing
	  • industry development objectives and skills shortages
	  • process and guidelines for the creation of new specialisations will be nominated as part of the supporting information for qualifications

Embedding qualifications	• IBSA has adopted a flexible approach to qualifications that allows for:
	  • stand-alone qualifications
	  • partial embedded based on clear evidence of need
	  • optional embedding through flexible elective choice based on clear evidence of need
	  • where specific licensing or accreditation requirements apply, those requirements will guide the structure of the qualification
	  • IBSA will add additional flexibility to any fully nested/embedded qualifications

Parity of qualifications	• an overarching principle is that the content of qualifications will be determined by the relevant outcomes and by the way skills and knowledge are developed in different contexts • development of qualifications in various IBSA sectors will be used to inform a set of guidelines around qualification parity to address issues raised by vastly divergent development philosophies

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Licensing	• IBSA will scope areas under its coverage impacted by licensing and determine priorities for action • IBSA will identify and participate in current licensing projects which impact its industry sectors • relevant qualifications will be developed in the context of current and emerging links between licensing and the training system

•

Skill Set Design

Issue	**Guiding Principles**

Skill sets as part of IBSA Training Packages	• skill sets are a design methodology that can be applied to provide more flexible training and skill development options within the national training system and will therefore be considered a priority development area across IBSA sectors
	• NQC has supported the skill set concept (30 June 2006), defined as follows:
	  • Those single units or combinations of units which link to a licence or regulatory requirement, or defined industry need.
	• other skill sets may be identified and an RTO will still be able to identify a relevant combination of units to meet local, enterprise or individual needs.
	• Training Package Development Handbook guides the identification of skill sets
	• IBSA views skill sets as a cluster of one or more units where achievement of competency in the units links to one or more of the following:
	  • industry or community recognition, meeting an identified area of skill need/skill shortage
	  • industry certification/accreditation
	  • regulatory compliance
	  • a licence to operate in a given context
	  • vendor certification
	• all future IBSA development and review projects will include consideration of the need for skill set development and involve consultation with industry, the training system and individuals on priority areas

Composition and naming of skill sets	• each skill set will be named using terminology meaningful to the primary target audience • skill sets may comprise any combination of units which meets the identified need and may include combinations of units

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which:

- vary in scope and complexity
- originate in different Training Packages

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Unit Design

Issue	Guiding Principles
Scope of each unit of competency	• each IBSA unit will represent a discrete function and will not embed the content of other units • IBSA Training Packages support the place of units that may reach beyond existing notions of 'workplace functions' to reflect broad and varied individual, community and industry needs i.e. essential skills • where skills and knowledge are identified in the Required Skills and Knowledge section, clear specification of the scope of skills and knowledge required within that particular unit will be a key focus • each unit will clearly articulate relationships with other units and prerequisites will be kept to an absolute minimum • any referencing to other units will go beyond internal IBSA referencing to allow for broad application across all other relevant industry sectors • clear and explicit differentiation between units in the same skill area at different levels will be a key focus, with this differentiation to be evident within every unit component
Language	• all IBSA units will use plain English • IBSA cross-industry units will use context-neutral terminology to ensure they can be applied across varying contexts • generic parenthood statements will not appear in IBSA units, unless required by national policy decisions beyond the control of IBSA
Specialist versus generalist units	• units covering similar content areas will be developed at the same time and by the same people under a continuous improvement process to facilitate a more cohesive overall unit structure • units will provide clear information about the way different units are applied and by whom • IBSA will consider the development of support materials (e.g. unit maps) to assist users in navigating the range of available units in a given skill area and the most appropriate units for particular purposes
Unit codes	• unit codes will include a number denoting the advised earliest appropriate packaging level for a unit within a qualification – but this does not indicate the unit itself has an AQF level
Knowledge and research	• IBSA confirms and supports the value and importance of knowledge for all individuals in the workplace

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	• application of knowledge will remain paramount and this application will be reflected in all units • specific units which focus on applied knowledge to meet licensing, regulatory or other well-defined industry needs will be supported • for units within lower level qualifications approaches will be kept broad to allow for a focus on transferable research skills • existing units packaged at higher level qualification will be reviewed, with a view to better articulation of specialised combinations of knowledge, skill and performance
Learning and development	• IBSA confirms and supports the value and importance of ongoing learning and development for all individuals • all units will explicitly embed learning as reflected in the current IBSA Generic Employability Skills Framework • IBSA Training Package content will also include units dedicated to ongoing learning and development across all levels
Creativity, innovation and design	• all units will explicitly embed innovation and creativity as reflected in the current Employability Skills Framework • all IBSA Training Packages will include a suite of dedicated cross-industry units addressing creativity, innovation and design

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BSB10107 Certificate I in Business

Modification History

Not applicable.

Description

Descriptor

This qualification allows individuals to develop basic skills and knowledge to prepare for work. They may undertake a range of simple tasks under close supervision. The range of technical skills and knowledge is limited.

Job Roles

Job roles and titles vary across different industry sectors. This is an entry level qualification.

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Individuals may enter the qualification through a number of entry points including:

- beginning a career
- participating in a VET in Schools Program
- after achieving a Certificate I qualification in a Training Package other than Business Services
- seeking a career transition with vocational experience in industries or environments outside of Business Services.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB20107 Certificate II in Business
-

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Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• gathering, conveying and receiving verbal and written information • listening and understanding workplace instructions
Teamwork	• working with colleagues and supervisors to produce workplace documents
Problem-solving	• resolving simple maintenance issues with office equipment • solving routine problems related to hazards in the workplace, while under direct supervision
Initiative and enterprise	• raising occupational health and safety issues with the occupational health and safety officer
Planning and organising	• planning own work schedule to ensure tasks are completed on time
Self-management	• behaving in ways that contribute to an effective and safe working environment • identifying own roles and responsibilities
Learning	• listening to ideas and opinions of other members of the team • following safety procedures
Technology	• operating a range of business equipment

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Packaging Rules

Packaging Rules

Total number of units = 6

1 core unit plus

5 elective units

4 elective units must be selected from the elective units listed below.

1 elective unit may be selected from the remaining elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level.

Core unit

Occupational Health and Safety

BSBOHS201A Participate in OHS processes

Elective units

General Administration

BSBADM101A Use business equipment and resources

Industry Context

BSBIND201A Work effectively in a business environment

Interpersonal Communication

BSBCMM101A Apply basic communication skills

IT Use

BSBITU101A Operate a personal computer

BSBITU102A Develop keyboard skills

BSBITU202A Create and use spreadsheets

Learning and Development

BSBLED101A Plan skills development

Sustainability

BSBSUS201A Participate in environmentally sustainable work practices

Workplace Effectiveness

BSBWOR202A Organise and complete daily work activities

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BSB20107 Certificate II in Business

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07 Business Services Training Package*. • Elective unit FNSICGEN305B replaced with FNSACC301A

Description

Descriptor

This qualification reflects the role of individuals who perform a range of mainly routine tasks using limited practical skills and fundamental operational knowledge in a defined context, working under direct supervision.

Job Roles

- Administration Assistant
- Clerical Worker
- Data Entry Operator
- Information Desk Clerk
- Office Junior
- Receptionist.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB10107 Certificate I in Business or other relevant qualification/s

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OR

- with vocational experience assisting in a range of work settings without a formal business qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB30107 Certificate III in Business.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Qualification Code and Title The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating verbally with clients and colleagues • drafting routine correspondence that meets the organisational standards of style, format and accuracy
Teamwork	• working in a team environment to promote team commitment and cooperation
Problem-solving	• choosing appropriate methods for communication and transferring information • dealing with client enquiries and complaints

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Initiative and enterprise	• raising occupational health and safety issues with designated personnel
Planning and organising	• planning and organising own work schedule for the day • planning the layout of simple documents using appropriate software
Self-management	• dealing sensitively with client needs and cultural, family and individual differences • obtaining feedback on work performance and identifying opportunities for improvement
Learning	• encouraging, acknowledging and acting on constructive feedback from team members • using manuals, training booklets and online help to overcome difficulties
Technology	• selecting, maintaining and using business technology appropriate to the task

Packaging Rules

Total number of units = 12

1 core unit plus

11 elective units

7 elective units must be selected from the elective units listed below.

The remaining **4 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below **2** of the **4 elective units** may be selected from either a Certificate I or a Certificate III qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core unit

Occupational Health and Safety

BSBOHS201A Participate in OHS processes Unit code Unit title

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Elective units

Customer Service

BSBCUS201B Deliver a service to customers

Industry Context

BSBIND201A Work effectively in a business environment

Information Management

BSBINM201A Process and maintain workplace information

BSBINM202A Handle mail

Innovation

BSBINN201A Contribute to workplace innovation

Interpersonal Communication

BSBCMM201A Communicate in the workplace

IT Use

BSBITU201A Produce simple word processed documents

BSBITU202A Create and use spreadsheets

BSBITU203A Communicate electronically

Small and Micro Business

BSBSMB201A Identify suitability for micro business

Sustainability

BSBSUS201A Participate in environmentally sustainable work practices

Workplace Effectiveness

BSBWOR202A Organise and complete daily work activities

BSBWOR203B Work effectively with others

BSBWOR204A Use business technology

Imported Units

FNSACC301A Process financial transactions and extract interim reports

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BSB20211 Certificate II in Customer Contact

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* *Replaces* BSB20207 Certificate II in Customer Contact

Description

This qualification reflects the role of individuals who typically interact with customers under direct supervision and with limited authority to delegate.

Duties at this level would include working with multiple communication channels, receiving and responding to customer requests, and capturing data.

Job roles

Possible job roles relevant to this qualification include:

- customer contact assistants or operators.
-

Pathways Information

Pathways into the qualification

- with vocational experience assisting in a range of work settings without a formal business qualification.

Pathways from the qualification

- BSB30211 Certificate III in Customer Contact or a range of other Certificate III qualifications.

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements.

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Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability skill	Industry/enterprise requirements for this qualification include:
Communication	• listening and questioning to identify customer needs • writing customer notes, emails and faxes
Teamwork	• referring matters to nominated personnel as required • working as a member of a team and applying knowledge of one's own role to achieve team goals • working with diverse persons and groups
Problem-solving	• searching product and service information, using multiple sources of information to match customer requests • using problem-solving approaches to identify customer needs and expectations
Initiative and enterprise	• contributing to suggestions for improvements to products, services and processes
Planning and organising	• maintaining customer records • operating multiple enterprise systems
Self-management	• managing own time and work priorities • managing personal stress
Learning	• learning new ideas, skills and techniques • seeking appropriate technical help with new computerised systems, products and services
Technology	• using electronic communication devices and processes, i.e. internet, intranet, telephony equipment, software packages, enterprise systems and email to action customer contact • using technology to assist the manipulation of information

Packaging Rules

Total number of units = 9

3 core units *plus*

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6 elective units of which:

- 3 units must be from the elective units below
- the remaining 3 units may be from the elective units below, or from qualifications at the same level or one higher in any endorsed Training Package or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBCCO203A Conduct customer contact

BSBCCO205A Prepare for work in a customer contact environment

BSBCMM201A Communicate in the workplace

Elective units

BSBCCO301B Use multiple information systems

BSBCCO305B Process credit applications

BSBCCO308A Conduct outbound customer contact

BSBCCO309A Develop product and service knowledge for customer contact operation

BSBCMM301B Process customer complaints

BSBCUS201B Deliver a service to customers

BSBITU101A Operate a personal computer

BSBITU203A Communicate electronically

BSBLED301A Undertake elearning

BSBOHS201A Participate in OHS processes

BSBWOR201A Manage personal stress in the workplace

BSBWOR203B Work effectively with others

ICAICT103A Use, communicate and search securely on the internet

ICAICT203A Operate application software packages

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BSB30110 Certificate III in Business

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Units code identifiers updated: • BSBCMM301A now BSBCMM301B • BSBCUS301A now BSBCUS301B • BSBWOR301A now BSBWOR301B

Description

Descriptor

This qualification reflects the role of individuals who apply a broad range of competencies in a varied work context using some discretion, judgement and relevant theoretical knowledge. They may provide technical advice and support to a team.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- customer service adviser
- data entry operator
- general clerk
- payroll officer
- typist
- word processing operator.
-

Pathways Information

Qualification pathways

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

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- BSB20107 Certificate II in Business or other relevant qualification

OR

- with vocational experience assisting in a range of support roles without a formal business qualification.

Pathways from the qualification

- BSB40207 Certificate IV in Business, or a range of other Certificate IV qualifications
-

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

BSB30110 Certificate III in Business

The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability skill	**Industry or enterprise requirements for this qualification include**:
Communication	• communicating verbally with others in negotiation, training and questioning • writing a range of simple documentation and communications
Teamwork	• completing individual tasks to support team goals • conveying workplace procedures and work instructions to team members
Problem-solving	• resolving issues and conflicts with team members • using manuals and other documentation to overcome problems with information technology or other office equipment
Initiative and enterprise	• demonstrating individual responsibility for completing tasks • suggesting improvements to support the development of

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	improved work practices and team effectiveness
Planning and organising	• contributing to planning processes with team members to meet expected outcomes • gathering, organising and applying workplace information for the organisation's work processes and information systems
Self-management	• identifying development needs and seeking training to fill needs • monitoring and recording the performance of own work area
Learning	• developing a comprehensive knowledge and understanding of products and services • identifying priorities and pursuing personal work goals according to organisational objectives
Technology	• using information communication technology to communicate with team members or clients • using word processing packages, spreadsheets or databases to produce written correspondence and reports

Packaging Rules

Total number of units = 12

1 core unit *plus*

11 elective units

7 of the elective units must be selected from the elective units listed below.

4 elective units may be selected from the elective units listed below, from this Training Package or from any current accredited course or endorsed Training Package at the same qualification level. If not listed below, **1 elective unit** may be selected from a Certificate II qualification and **2 elective units** may be taken from a Certificate IV qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core unit

BSBOHS301B Apply knowledge of OHS legislation in the workplace

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Elective units

Customer service

BSBCUS301B Deliver and monitor a service to customers

Diversity

BSBDIV301A Work effectively with diversity

Financial administration

BSBFIA301A Maintain financial records

General administration

BSBADM311A Maintain business resources

Information management

BSBINM301A Organise workplace information

BSBINM302A Utilise a knowledge management system

BSBFLM306C Provide workplace information and resourcing plans

Innovation

BSBINN301A Promote innovation in a team environment

Intellectual property

BSBIPR301A Comply with organisational requirements for protection and use of intellectual property

Interpersonal communication

BSBCMM301B Process customer complaints

IT use

BSBITU301A Create and use databases

BSBITU302B Create electronic presentations

BSBITU303A Design and produce text documents

BSBITU304A Produce spreadsheets

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BSBITU305A Conduct online transactions

BSBITU306A Design and produce business documents

BSBITU309A Produce desktop published documents

Management

BSBFLM309C	Support continuous improvement systems and processes
BSBFLM305C	Support operational plan

Product skills and advice

BSBPRO301A	Recommend products and services

Purchasing and contracting

BSBPUR301B	Purchase goods and services

Sustainability

BSBSUS301A	Implement and monitor environmentally sustainable work practices

Workplace effectiveness

BSBWOR301B	Organise personal work priorities and development
BSBWOR302A	Work effectively as an off-site worker
BSBFLM303C	Contribute to effective workplace relationships
BSBFLM312C	Contribute to team effectiveness
BSBFLM311C	Support a workplace learning environment

Writing

BSBWRT301A	Write simple documents

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BSB30211 Certificate III in Customer Contact

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* *Replaces* BSB30207 Certificate III in Customer Contact

Description

This qualification reflects the role of individuals who typically undertake complex customer interaction under supervision and with some authority to delegate.

Duties at this level would include working with multiple communication channels, receiving and responding to customer requests, handling customer complaints, adhering to key performance indicators, working in a team environment, providing support to a team, providing technical advice and capturing data.

Job roles

Possible job roles relevant to this qualification include:

- customer contact agents or operators
- customer services representatives
- telesales representatives.

Pathways Information

Pathways into the qualification

Preferred pathway for candidates considering this qualification include:

- BSB20211 Certificate II in Customer Contact or other relevant qualifications

or

- vocational experience assisting in a range of support roles without a formal business qualification.

Pathways from the qualification

BSB40311 Certificate IV in Customer Contact or a range of other Certificate IV qualifications.

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Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability skill	**Industry/enterprise requirements for this qualification include:**
Communication	• listening and questioning to identify customer needs • using appropriate tone and language • writing customer notes, emails and faxes
Teamwork	• referring matters to nominated personnel as required • working as a member of a team and applying knowledge of one's own role to achieve team goals • working with diverse persons and groups
Problem-solving	• processing complex enquiries • searching product and service information, using multiple sources of information to match customer requests • using problem-solving approaches to identify customer needs and expectations
Initiative and enterprise	• contributing to suggestions for improvements to products, services and processes • supporting operational plans and organisational goals
Planning and organising	• maintaining customer records • managing and updating multiple information sources • operating multiple enterprise systems
Self-management	• managing own performance • managing own time and work priorities • managing personal stress
Learning	• learning new ideas, skills and techniques • seeking appropriate technical help with new computerised systems, products and services

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Employability skill	Industry/enterprise requirements for this qualification include:
Technology	• using electronic communication devices and processes to action customer contact, i.e. internet, intranet, telephony equipment, software packages, enterprise systems and email • using technology to assist the manipulation of information

Packaging Rules

Total number of units = 12

4 core units *plus*

8 elective units of which:

- 2 units must be from Group A elective units below
- the remaining 6 units may be from Group A or Group B elective units, or from qualifications at the same level or one higher in any endorsed Training Package or accredited course.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBCCO301B Use multiple information systems

BSBCCO307A Work effectively in customer contact

BSBCCO309A Develop product and service knowledge for customer contact operation

BSBCUS301B Deliver and monitor a service to customers

Elective units

Group A

BSBCCO203A Conduct customer contact

BSBCCO204A Collect data

BSBCCO302B Deploy customer service field staff

BSBCCO303B Conduct a telemarketing campaign

BSBCCO304C Provide sales solutions to customers

BSBCCO305B Process credit applications

BSBCCO306B Process complex accounts

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BSBCCO308A Conduct outbound customer contact

BSBCCO403A Schedule customer contact activity

BSBCMM301B Process customer complaints

BSBITU203A Communicate electronically

BSBITU307A Develop keyboarding speed and accuracy

BSBLED301A Undertake elearning

BSBWOR203A Work effectively with others

BSBWOR301B Organise personal work priorities and development

Group B

BSBMGT401A Show leadership in the workplace

BSBMGT402A Implement operational plan

BSBMGT405A Provide personal leadership

BSBOHS201A Participate in OHS processes

BSBOHS301B Apply knowledge of OHS legislation in the workplace

BSBSLS407A Identify and plan sales prospects

BSBSLS408A Present, secure and support sales solutions

BSBSUS301A Implement and monitor environmentally sustainable work practices

BSBWOR201A Manage personal stress in the workplace

FNSSAM301A Identify opportunities for cross-selling products and services

ICAICT209A Interact with ICT clients

ICASAS204A Record client support requirements

ICASAS305A Provide IT advice to clients

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BSB30307 Certificate III in Micro Business Operations

Modification History

Release	Comments

Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*.
	• Elective unit FNSFLIT201B replaced with FNSFLT201A.
	• SIRXQUA001A included as an elective unit.
	• Outdated advice removed
	• updated unit codes:
	  • BSBCUS301A now BSBCUS301B
	  • BSBWOR301A now BSBWOR301B

Description

Descriptor

This qualification reflects the role of skilled operators who apply a broad range of competencies in varied micro business contexts, using some discretion and judgement and relevant theoretical knowledge. They may provide technical advice and support to a small team.

Job Roles

- Independent Contractor
- Micro Business Operator.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

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Candidates may enter the qualification through a number of entry points including:

- with personal or vocational experience in a specific industry
- with vocational experience in a specific industry and an industry specific qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB40407 Certificate IV in Small Business Management.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Qualification Code and Title The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• interpreting the needs of customers and markets • persuading key business stakeholders effectively • reading, interpreting and clarifying regulatory, taxation, financial and other business documentation
Teamwork	• applying teamwork skills to a range of micro business situations • working with diverse individuals and groups
Problem-solving	• seeking information and advice to identify and solve problems • using numeracy skills to calculate own financial position and

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	projected cash flow for the business
Initiative and enterprise	• developing innovative solutions to workplace challenges • identifying micro business opportunities • translating business ideas into a viable micro business proposal
Planning and organising	• collecting and analysing information about market needs • determining the required resources to establish the micro business • taking action to ensure that the business complies with taxation and business registration requirements
Self-management	• having personal goals and aspirations for the micro business • managing own time and priorities • taking personal responsibility for development of the business proposal
Learning	• seeking assistance and expert advice on financial, taxation and insurance requirements of the business • seeking out and learning new ideas, skills and techniques
Technology	• applying business technology for communication, preparing a proposal, budgeting and compliance • choosing, using and maintaining machinery and equipment for the micro business

Packaging Rules

Total number of units = 10

5 core units plus

5 elective units

The **5 elective units** may be selected from the elective units listed below and/or a Certificate III qualification from any currently endorsed Training Package or accredited course at the same qualification level. If not listed below **1 elective unit** may be selected from a Certificate II or Certificate IV qualification.

Electives must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

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Small and Micro Business

BSBSMB301A	Investigate micro business opportunities
BSBSMB302A	Develop a micro business proposal
BSBSMB303A	Organise finances for the micro business
BSBSMB304A	Determine resource requirements for the micro business
BSBSMB305A	Comply with regulatory, taxation and insurance requirements for the micro business

Elective units

Creative Thinking

BSBCRT301A	Develop and extend critical and creative thinking skills
BSBCRT501A	Originate and develop concepts

Customer Service

BSBCUS301B	Deliver and monitor a service to customers

E-Business

BSBEBU401A	Review and maintain a website

Financial Administration

BSBFIA301A	Maintain financial records
BSBFIA303A	Process accounts payable and receivable

Human Resource Management

BSBHRM402A	Recruit, select and induct staff

Innovation

BSBINN301A	Promote innovation in a team environment
SIRXQUA001A	Develop innovative ideas at work

Intellectual Property

BSBIPR405A	Protect and use intangible assets in small business

International Business

BSBINT303B	Organise the importing and exporting of goods

IT Use

BSBITU305A	Conduct online transactions

Relationship Management

BSBREL401A	Establish networks

Small and Micro Business

BSBSMB306A	Plan a home-based business

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BSBSMB307A	Set up information and communications technology for the micro business

Sustainability

BSBSUS301A	Implement and monitor environmentally sustainable work practices

Workplace Effectiveness

BSBWOR301B	Organise personal work priorities and development
BSBWOR302A	Work effectively as an off-site worker

Imported Units

FNSFLT201A	Develop and use a personal budget

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BSB30407 Certificate III in Business Administration

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Updated unit codes: • BSBCMM301A now BSBCMM301B • BSBCUS301A now BSBCUS301B • BSBWOR301A now BSBWOR301B

Description

Descriptor

This qualification reflects the role of individuals who apply a broad range of administrative competencies in varied work contexts, using some discretion and judgement. They may provide technical advice and support to a team.

Job Roles

- Accounts Receivable Clerk
- Accounts Payable Clerk
- Clerk
- Data Entry Operator
- Junior Personal Assistant
- Receptionist
- Office Administration Assistant
- Office Administrator
- Word Processing Operator.
-

Pathways Information

Qualification Pathways

Pathways into the qualification

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Preferred pathways for candidates considering this qualification include:

- BSB20107 Certificate II in Business or other relevant qualification/s

OR

- with vocational experience assisting in a range of support roles without a formal business qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Administration Assistant
- Clerical Worker
- Data Entry Operator
- Information Desk Clerk
- Office Junior
- Receptionist.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB40507 Certificate IV in Business Administration.
-

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

BSB30407 Certificate III in Business Administration

The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that

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may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• clearly communicating workplace information to others (verbal and non-verbal) • communicating sensitively in a cross-cultural context • communicating with colleagues and clients to handle verbal enquiries such as clarifying instructions and responding to requests for information • communicating with people who speak languages other than English • interpreting needs of clients (internal or external) • interpreting the needs of customers • reading and interpreting workplace related documentation • writing to audience needs
Teamwork	• applying knowledge of own role to complete activities efficiently to support team activities and tasks • working in a team of people to provide office administration services • working with diverse individuals and groups
Problem-solving	• developing practical responses to common breakdowns in workplace systems and procedures • rectifying discrepancies or errors in documentation and transactions • taking action to resolve concerns
Initiative and enterprise	• adapting to new and emerging situations in the workplace • being proactive and creative in responding to workplace problems, changes and challenges
Planning and organising	• allocating resources to workplace tasks and requirements • collecting, analysing and organising workplace data • identifying risk factors and taking action to minimise risk • organising meeting schedules for clients and colleagues and negotiating alternative arrangements • planning for contingencies • planning information and documentation requirements • utilising or determining required resources
Self-management	• following workplace documentation such as codes of practice or operating procedures • projecting a professional image when representing the organisation • setting own work program and managing time to ensure tasks are done on time • taking personal responsibility at the appropriate level

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	• working ethically when dealing with financial transactions
Learning	• maintaining continuous learning by seeking out opportunities for improvement and developing new skills • seeking assistance and expert advice
Technology	• using business related technology safely (OHS) • using business technology such as software programs for word processing spreadsheets, presentation and scheduling

Packaging Rules

Total number of units = 13

2 core units plus

11 elective units

7 elective units must be selected from the **Group A** units listed below.

The remaining **4 elective units** may be selected from the **Group A** or **Group B** elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below **2 of the electives units** may be selected from a Certificate II or Certificate IV qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Where the packaging rules of this qualification meet the rules of a specialist qualification, the specialist qualification and not the generic qualification must be awarded.

Core Units

IT Use

BSBITU307A Develop keyboarding speed and accuracy

Occupational Health and Safety

BSBOHS201A Participate in OHS processes

Elective units

Group A units

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Financial Administration

BSBFIA302A Process payroll

BSBFIA303A Process accounts payable and receivable

BSBFIA304A Maintain a general ledger

General Administration

BSBADM307B Organise schedules

IT Use

BSBITU302B Create electronic presentations

BSBITU303A Design and produce text documents

BSBITU304A Produce spreadsheets

BSBITU306A Design and produce business documents

BSBITU309A Produce desktop published documents

Writing

BSBWRT301A Write simple documents

Group B units

Customer Service

BSBCUS301B Deliver and monitor a service to customers

Diversity

BSBDIV301A Work effectively with diversity

Financial Administration

BSBFIA301A Maintain financial records

General Administration

BSBADM302B Produce texts from notes

BSBADM303B Produce texts from audio transcription

BSBADM311A Maintain business resources

Information Management

BSBINM301A Organise workplace information

BSBINM302A Utilise a knowledge management system

BSBINM303A Handle receipt and despatch of information

Innovation

BSBINN201A Contribute to workplace innovation

Intellectual Property

BSBIPR301A Comply with organisational requirements for protection and use of intellectual

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property

Interpersonal Communication

BSBCMM301B Process customer complaints

IT Use

BSBITU301A Create and use databases

BSBITU305A Conduct online transactions

Occupational Health and Safety

BSBOHS407A Monitor a safe workplace

Product Skills and Advice

BSBPRO301A Recommend products and services

Sustainability

BSBSUS201A Participate in environmentally sustainable work practices

Workplace Effectiveness

BSBWOR204A Use business technology

BSBWOR301B Organise personal work priorities and development

BSBWOR302A Work effectively as an off-site worker

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BSB30507 Certificate III in Business Administration(International Education)

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. • Outdated advice removed • updated imported unit code: • CHCAD2C now CHCAD402D

Description

Descriptor

This qualification reflects the role of individuals working in international education administration who apply a broad range of competencies using some discretion and judgement, and relevant theoretical knowledge. They may provide technical advice and support to a team.

International education work contexts include international onshore education, transnational offshore education, international projects and exchange or study abroad programs. A range of education sectors and organisations (public and private) provide international education. Sectors include higher education, vocational education and training, schools, English Language Intensive Courses for Overseas Students (ELICOS) and preparatory (foundation, bridging and enabling courses).

Job Roles

- Administration Officer, TAFE International Marketing Office (offshore programs)
- Administration Officer, University International Education Information Services
- Administrative Assistant, International Office of University
- Administrative Assistant, International Pastoral Care Services, secondary school
- Assistant Administrative Officer
- Education Program Support Worker, TAFE International Education Department
- Information Services Assistant/Officer, International Education Office of a school
- International Education Agent

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- Receptionist, Registered Training Organisation providing ELICOS
- Student Recruitment and Admissions Assistant
- Student Services Officer
- Student Support Assistant.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB20107 Certificate II in Business or other relevant qualification/s

OR

- with vocational experience assisting in a range of support roles without a formal business qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Administration Assistant
- Clerical Worker
- Data Entry Operator
- Information Desk Clerk
- Office Junior
- Receptionist.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB40507 Certificate IV in Business Administration.
-

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Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Qualification Code and Title The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• clearly communicating workplace information to others (verbal and non-verbal) • communicating sensitively in a cross-cultural context • communicating with people who speak languages other than English • interpreting needs of customers (internal or external) • reading and interpreting workplace related documentation • writing to audience needs
Teamwork	• applying knowledge of own role as part of a team • working as an individual and as a member of a team • working with diverse individuals and groups
Problem-solving	• developing practical responses to workplace related functions • taking action to resolve concerns
Initiative and enterprise	• adapting to new and emerging situations • being creative or proactive in response to workplace problems, changes and challenges
Planning and organising	• allocating resources to workplace tasks and requirements • collecting, analysing and organising workplace data

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	• identifying risk factors and taking action to minimise risk • planning for contingencies • utilising or determining required resources
Self-management	• following workplace documentation such as codes of practice or operating procedures • managing own time and priorities • projecting a professional image when representing the organisation • taking personal responsibility at the appropriate level
Learning	• maintaining knowledge of products and services • participating in ongoing learning (formal or informal) • seeking assistance and expert advice
Technology	• applying business related technology skills in organising and using workplace information • using business related technology and equipment • using business related technology safely (OHS)

Packaging Rules

Total number of units = 12

5 core units plus

7 elective units

5 elective units must be selected from the elective units listed below.

The remaining **2 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below **1 unit** may be selected from a Certificate II or Certificate IV qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

Diversity

BSBDIV301A Work effectively with diversity

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Educational Administration

BSBEDU301A Assist with monitoring compliance in international education*

BSBEDU302A Assist in resolution of issues and incidents in an international education environment*

Industry Context

BSBIND302A Work effectively in the international education services industry*

IT Use

BSBITU306A Design and produce business documents

Elective units

Customer Service

BSBCUS301B Deliver and monitor a service to customers

Educational Administration

BSBEDU303A Assist with the provision of international education information*

BSBEDU304A Assist with the provision of pastoral care services to international students*

BSBEDU305A Assist with international education events and programs*

Financial Administration

BSBFIA301A Maintain financial records

General Administration

BSBADM307B Organise schedules

BSBADM311A Maintain business resources

BSBADM405B Organise meetings

BSBADM406B Organise business travel

Information Management

BSBINM301A Organise workplace information

IT Use

BSBITU202A Create and use spreadsheets

BSBITU301A Create and use databases

BSBITU302B Create electronic presentations

BSBITU307A Develop keyboarding speed and accuracy

BSBITU309A Produce desktop published documents

Marketing

BSBMKG401B Profile the market

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Occupational Health and Safety

BSBOHS301B Apply knowledge of OHS legislation in the workplace

Recordkeeping

BSBRKG402B Provide information from and about records

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

Writing

BSBWRT301A Write simple documents

Imported Units

CHCAD402D Support the interests, rights and needs of clients within duty of care requirements

HLTFA301B Apply first aid

ICAU1204B Locate and use relevant on-line information

* Note: These units are based on modules from the accredited courses 30511QLD Certificate III in International Education Services, 30512QLD Certificate IV in International Education Services and 30513QLD Diploma of International Education Services; permission to adapt the modules was granted by the copyright holder, International Education Services Ltd.

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BSB30607 Certificate III in International Trade

Modification History

Release	Comments

Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*.
	• Outdated advice removed
	• updated unit codes:
	  • BSBCMM301A now BSBCMM301B
	  • BSBCUS301A now BSBCUS301B
	  • BSBWOR301A now BSBSWOR301B

Description

Descriptor

This qualification reflects the role of skilled operators who apply a broad range of international trade competencies in varied work contexts, using some discretion and judgement and relevant theoretical knowledge. They may provide technical advice and support to a team.

Job Roles

- Export Clerk
- Import Clerk
- Import/Export Clerk.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

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Preferred pathways for candidates considering this qualification include:

- BSB20107 Certificate II in Business or other relevant qualification/s

OR

- with vocational experience in assisting international trade/business team leaders, supervisors or managers to conduct international trade activities but without formal international trade qualifications.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Administration Assistant
- Clerical Worker
- Data Entry Operator
- Information Desk Clerk
- Office Junior
- Receptionist.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB41107 Certificate IV in International Trade.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY

Qualification Code and Title

The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating with carriers to pick up and deliver goods • using written and verbal communication skills to work with others in the process of arranging international transportation of goods
Teamwork	• applying teamwork skills to ensure the timely arrival/departure of international goods or services • clarifying compliance requirements for international trade with others in the workplace
Problem-solving	• identifying and taking action to resolve problems such as insurance claims arising as a result of goods damaged in transit • rescheduling forwarding or transfer of goods/services when delays occur
Initiative and enterprise	• investigating sources of information about international trade • making suggestions for improvement to knowledge management systems to relevant personnel
Planning and organising	• assisting in the organisation of importing and exporting goods by contributing to cost calculations, completing documentation and communicating with carriers • informing colleagues and contractors of expected time of arrival and deadlines for pick up of goods to meet carrier requirements
Self-management	• clarifying own role in transfer of international services from the job description, written instructions and discussions with the supervisor • managing own time to ensure tasks are completed on time
Learning	• seeking the assistance of others to clarify requirements when not known • undertaking learning to ensure currency of knowledge and skills about regulatory codes and their impact on own work
Technology	• producing documents using word processing, spreadsheet and specialised computer programs • using the internet and organisation's extranet and intranet to access information about the importation and exportation of

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	goods

Packaging Rules

Total number of units = 12

1 core unit plus

11 elective units

5 elective units must be selected from the **Group A** units listed below.

4 elective units must be selected from the remaining elective units listed below.

The remaining **2 elective units** may be selected from the **Group A** or **Group B** elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below **1 of the elective units** may be selected from either a Certificate II or Certificate IV qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core Units

Occupational Health and Safety

BSBOHS407A Monitor a safe workplace

Elective units

Group A units

International Business

BSBINT301B Apply knowledge of the international trade environment to complete work

BSBINT302B Apply knowledge of legislation relevant to international trade to complete work

BSBINT303B Organise the importing and exporting of goods

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BSBINT304B Assist in the international transfer of services

BSBINT305B Prepare business documents for the international trade of goods

BSBINT306B Apply knowledge of international finance and insurance to complete work requirements

Group B units

Customer Service

BSBCUS301B Deliver and monitor a service to customers

Diversity

BSBDIV301A Work effectively with diversity

Financial Administration

BSBFIA301A Maintain financial records

General Administration

BSBADM311A Maintain business resources

Information Management

BSBINM301A Organise workplace information

BSBINM302A Utilise a knowledge management system

Interpersonal Communication

BSBCMM301B Process customer complaints

IT Use

BSBITU303A Design and produce text documents

BSBITU305A Conduct online transactions

BSBITU306A Design and produce business documents

Product Skills and Advice

BSBPRO301A Recommend products and services

Purchasing and Contracting

BSBPUR301B Purchase goods and services

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

Workplace Effectiveness

BSBWOR301B Organise personal work priorities and development

BSBWOR302A Work effectively as an off-site worker

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Writing

BSBWRT301A Write simple documents

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BSB30707 Certificate III in Occupational Health and Safety

Modification History

Release	Comments

Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*.
	• Outdated advice removed
	• updated unit codes:
	  • BSBCMM301A now BSBCMM301B
	  • BSBCUS301A now BSBSCUS301B
	  • BSBWOR301A now BSBWOR301B

Description

Descriptor

This qualification reflects the role of skilled operators who apply a broad range of competencies in varied work contexts, using some discretion and judgement and relevant theoretical knowledge. They may provide technical advice and support to a team. This qualification is for people whose main job is not dedicated to OHS but who take it on as a voluntary duty.

Job Roles

- Health and Safety Assistant
- Health and Safety Committee Member
- Health and Safety Representative.
-

Pathways Information

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB20107 Certificate II in Business or other relevant qualification/s

OR

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- with vocational experience working in occupational health and safety roles without a formal business qualification. This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB41407 Certificate IV in Occupational Health and Safety.
-

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

BSB30707 Certificate III in Occupational Health and Safety

The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• contributing to communication processes with emergency management services and talking with the casualty, bystanders and medical staff in an emergency situation
Teamwork	• working as part of a group to request occupational health and safety information and data
Problem-solving	• contributing to assessment of risks to first aiders and others, and determining an appropriate response
Initiative and enterprise	• identifying possible improvements to occupational health and safety and contributing these to the decision making process
Planning and organising	• contributing to plans such as occupational health and safety action plans

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Self-management	• organising daily priorities
Learning	• applying learning about occupational health and safety processes to future operations
Technology	• using communication technology including media and equipment to talk to emergency management services

Packaging Rules

Total number of units = 12

7 core units plus

5 elective units

3 elective units must be selected from the elective units listed below.

The remaining **2 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from a Certificate II qualification and **1 unit** from a Certificate IV qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

BSBOHS301B	Apply knowledge of OHS legislation in the workplace
BSBOHS302B	Participate effectively in OHS communication and consultative processes
BSBOHS303B	Contribute to OHS hazard identification and risk assessment
BSBOHS304B	Contribute to OHS hazard control
BSBOHS305B	Contribute to OHS issue resolution
BSBOHS306B	Contribute to implementing emergency prevention activities and response procedures
BSBOHS307B	Participate in OHS investigations

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Elective units

Customer Service

BSBCUS301B Deliver and monitor a service to customers

Diversity

BSBDIV301A Work effectively with diversity

Financial Administration

BSBFIA301A Maintain financial records

General Administration

BSBADM311A Maintain business resources

Information Management

BSBINM301A Organise workplace information

BSBINM302A Utilise a knowledge management system

Innovation

BSBINN201A Contribute to workplace innovation

Interpersonal Communication

BSBCMM301B Process customer complaints

IT Use

BSBITU306A Design and produce business documents

Product Skills and Advice

BSBPRO301A Recommend products and services

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

Workplace Effectiveness

BSBWOR301B Organise personal work priorities and development

BSBWOR401A Establish effective workplace relationships

Writing

BSBWRT301A Write simple documents

Imported Units

HLTFA402B Apply advanced first aid

HLTFA403A Manage first aid in the workplace

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BSB30807 Certificate III in Recordkeeping

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07 Business Services Training Package.* Updated unit codes: • BSBCMM301A now BSBCMM301B • BSBCUS301A now BSBCUS301B • BSBWOR301A now BSBWOR301B

Description

Descriptor

This qualification reflects the role of individuals who apply some understanding of relevant theoretical knowledge relating to recordkeeping functions in the workplace. While it may apply to individuals whose sole workplace function is recordkeeping, it will also apply to administrative, human resources or other staff within an organisation for whom recordkeeping is one of many duties for which they hold responsibility.

Job Roles

- Administration Officer
- Assistant Records Clerk
- Assistant Registry Officer.
-

Pathways Information

Qualification Pathways

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB20107 Certificate II in Business or other relevant qualification/s

OR

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- with vocational experience in a range of environments providing administrative or operational support to business or records systems without a formal business qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Administration Assistant
- Clerical Worker
- Data Entry Operator
- Information Desk Clerk
- Office Junior
- Receptionist.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB41707 Certificate IV in Recordkeeping.
-

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

BSB30807 Certificate III in Recordkeeping

The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

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Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating verbally with others in negotiation, training and questioning • preparing simple documentation and reports for requests of information • writing a range of simple documentation and communications
Teamwork	• completing individual tasks to support team goals • conveying workplace procedures and work instructions to team members
Problem-solving	• analysing business or records system to efficiently locate information • using research skills to locate workplace information
Initiative and enterprise	• demonstrating individual responsibility for completing tasks • suggesting improvements to support the development of improved work practices and team effectiveness
Planning and organising	• contributing to planning processes with team members to meet expected outcomes • gathering, organising and applying workplace information for the organisation's work processes and records systems
Self-management	• identifying development needs and seeking training to fill needs • monitoring and recording the performance of own work area
Learning	• developing a comprehensive knowledge and understanding of records systems • identifying priorities and pursuing personal work goals in accordance with organisational objectives
Technology	• collecting and manipulating data using appropriate technology • ensuring systems are appropriate for information storage, security and retrieval

Packaging Rules

Total number of units = 12

5 core units plus

7 elective units

The **7 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed

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below, **1 unit** may be selected from either a Certificate II or Certificate IV qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

Recordkeeping

BSBRKG301B	Control records
BSBRKG302B	Undertake disposal
BSBRKG303B	Retrieve information from records
BSBRKG304B	Maintain business records
BSBRKG305A	Review recordkeeping functions

Elective units

Customer Service

BSBCUS301B	Deliver and monitor a service to customers

Diversity

BSBDIV301A	Work effectively with diversity

Financial Administration

BSBFIA301A	Maintain financial records

General Administration

BSBADM311A	Maintain business resources

Information Management

BSBINM301A	Organise workplace information
BSBINM302A	Utilise a knowledge management system

Innovation

BSBINN201A	Contribute to workplace innovation

Interpersonal Communication

BSBCMM301B	Process customer complaints

IT Use

BSBITU301A	Create and use databases
BSBITU302B	Create electronic presentations
BSBITU303A	Design and produce text documents
BSBITU304A	Produce spreadsheets

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BSBITU305A Conduct online transactions

BSBITU306A Design and produce business documents

BSBITU309A Produce desktop published documents

Product Skills and Advice

BSBPRO301A Recommend products and services

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

Workplace Effectiveness

BSBWOR301B Organise personal work priorities and development

BSBWOR302A Work effectively as an off-site worker

Writing

BSBWRT301A Write simple documents

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BSB30907 Certificate III in Business Administration (Education)

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07 Business Services Training Package.* Unit codes updated: • BSBCMM301A now BSBCMM301B • BSBCUS301A now BSBCUS301B • BSBWOR301A now BSBWOR301B

Description

Descriptor

This qualification reflects the role of individuals who apply a broad range of administrative competencies in an educational or school support work context, using some discretion and judgement. They may provide technical advice and support to a team.

Job Roles

- Education Program Support Worker
- School Support Officer
- Student Recruitment and Admissions Assistant
- Student Services Officer
- Student Support Assistant.
-

Pathways Information

Qualification Pathways

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB20107 Certificate II in Business or other relevant qualification/s

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OR

- with vocational experience assisting in a range of support roles without a formal business qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Administration Assistant
- Clerical Worker
- Data Entry Operator
- Information Desk Clerk
- Office Junior
- Receptionist.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB40507 Certificate IV in Business Administration.
-

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

BSB30907 Certificate III in Business Administration (Education)

The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

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Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating with colleagues and clients to handle verbal inquiries such as enrolment advice, payroll questions or records enquiries • interpreting the needs of customers • clearly communicating workplace information to others (verbal and non-verbal) • communicating sensitively in a cross-cultural context • communicating with people who speak languages other than English • interpreting needs of students and clients (internal or external) • reading and interpreting workplace related documentation • writing to audience needs
Teamwork	• applying knowledge of own role to complete activities efficiently to support team activities and tasks • working in a team of people to provide general office and educational administration and/or record keeping services • working with diverse individuals and groups
Problem-solving	• developing practical responses to common breakdowns in workplace systems and procedures • rectifying discrepancies or errors in documentation and transactions • taking action to resolve concerns
Initiative and enterprise	• adapting to new and emerging situations in the workplace • being proactive and creative in responding to workplace problems, changes and challenges
Planning and organising	• allocating resources to workplace tasks and requirements • collecting, analysing and organising workplace data • identifying risk factors and taking action to minimise risk • organising meeting schedules for clients and colleagues and negotiating alternative arrangements • planning for contingencies • planning information and documentation requirements • utilising or determining required resources
Self-management	• following workplace documentation such as codes of practice or operating procedures • projecting a professional image when representing the organisation • setting own work program and managing time to ensure tasks are done on time • taking personal responsibility at the appropriate level • working ethically when dealing with financial transactions

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Learning	• maintaining continuous learning by seeking out opportunities for improvement and developing new skills • seeking assistance and expert advice
Technology	• using business related technology safely (OHS) • using business technology such as software programs for word processing spreadsheets, presentation and scheduling

Packaging Rules

Total number of units = 13

2 core units plus

5 elective units selected from the **Group A** units listed below including:

BSBIND301A Work effectively in an educational environment

4 elective units must be selected from the **Group B** units listed below.

The remaining **2 elective units** may be selected from the **Group A**, **Group B** or **Group C** units listed below, or any currently endorsed Training Package or accredited course at the same qualification level or one level lower or higher.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

IT Use

BSBITU307A Develop keyboarding speed and accuracy

Occupational Health and Safety

BSBOHS201A Participate in OHS processes

OR

BSBOHS306B Contribute to implementing emergency prevention activities and response procedures

Elective units

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Group A units

Industry Context

BSBIND301A Work effectively in an educational environment

General Administration

BSBADM405B Organise meetings

BSBADM406B Organise business travel

Customer Service

BSBCUS301B Deliver and monitor a service to customers

E-Business

BSBEBU401A Review and maintain a website

Marketing

BSBMKG408B Conduct market research

Imported Units

CHCCS2C Deliver and develop client service

CHCCS407A Operate referral procedures

CULMS207C Assist with the presentation of public activities and events

HLTFA301B Apply first aid

ICAU1204B Locate and use relevant on-line information

PSPETHC301B Uphold the values and principles of public service

PSPGOV314A Contribute to conflict management

PSPLEGN301B Comply with legislation in the public sector

Group B units

Financial Administration

BSBFIA302A Process payroll

BSBFIA303A Process accounts payable and receivable

BSBFIA304A Maintain a general ledger

General Administration

BSBADM307B Organise schedules

IT Use

BSBITU302B Create electronic presentations

BSBITU303A Design and produce text documents

BSBITU304A Produce spreadsheets

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BSBITU306A Design and produce business documents

BSBITU309A Produce desktop published documents

Writing

BSBWRT301A Write simple documents

Group C units

Customer Service

BSBCUS301B Deliver and monitor a service to customers

Diversity

BSBDIV301A Work effectively with diversity

Financial Administration

BSBFIA301A Maintain financial records

General Administration

BSBADM302B Produce texts from notes

BSBADM303B Produce texts from audio transcription

BSBADM311A Maintain business resources

Information Management

BSBINM301A Organise workplace information

BSBINM302A Utilise a knowledge management system

BSBINM303A Handle receipt and despatch of information

Innovation

BSBINN201A Contribute to workplace innovation

Interpersonal Communication

BSBCMM301B Process customer complaints

IT Use

BSBITU301A Create and use databases

BSBITU305A Conduct online transactions

Occupational Health and Safety

BSBOHS407A Monitor a safe workplace

Product Skills and Advice

BSBPRO301A Recommend products and services

Sustainability

BSBSUS201A Participate in environmentally sustainable work practices

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Workplace Effectiveness

BSBWOR204A	Use business technology
BSBWOR301B	Organise personal work priorities and development
BSBWOR302A	Work effectively as an off-site worker

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BSB31007 Certificate III in Business Administration (Legal)

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Updated unit codes: • BSBCMM301A now BSBCMM301B • BSBCUS301A now BSBCUS301B • BSBWOR301A now BSBWOR301B

Description

Descriptor

This qualification reflects the role of individuals who apply a broad range of administrative competencies in a legal office work environment, using some discretion and judgement. They may provide technical advice and support to a team.

Job Roles

- Legal Receptionist.
-

Pathways Information

Qualification Pathways

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB20107 Certificate II in Business or other relevant qualification/s

OR

- with vocational experience assisting in a range of support roles without a formal business qualification.

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Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Administration Assistant
- Clerical Worker
- Data Entry Operator
- Information Desk Clerk
- Office Junior
- Receptionist.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB41207 Certificate IV in Legal Services.
-

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

BSB31007 Certificate III in Business Administration (Legal)

The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• clearly communicating workplace information to others (verbal and non-verbal) • communicating sensitively in a cross-cultural context

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	• communicating with colleagues and clients to handle verbal inquiries such as requests for legal documents, schedules or records enquiries • communicating with people who speak languages other than English • interpreting needs of clients (internal or external) • reading and interpreting workplace related documentation • writing to audience needs
Teamwork	• applying knowledge of own role to complete activities efficiently to support team activities and tasks • working in a team of people to provide legal administration including record keeping services • working with diverse individuals and groups
Problem-solving	• developing practical responses to common breakdowns in workplace systems and procedures • rectifying discrepancies or errors in documentation and transactions • taking action to resolve concerns
Initiative and enterprise	• adapting to new and emerging situations in the workplace • being proactive and creative in responding to workplace problems, changes and challenges
Planning and organising	• allocating resources to workplace tasks and requirements • collecting, analysing and organising workplace data • identifying risk factors and taking action to minimise risk • organising meeting schedules for clients and colleagues and negotiating alternative arrangements • planning for contingencies • planning information and documentation requirements • utilising or determining required resources
Self-management	• following workplace documentation such as codes of practice or operating procedures • projecting a professional image when representing the organisation • setting own work program and managing time to ensure tasks are done on time • taking personal responsibility at the appropriate level • working ethically when dealing with financial transactions
Learning	• maintaining continuous learning by seeking out opportunities for improvement and developing new skills • seeking assistance and expert advice
Technology	• using business related technology safely (OHS) • using business technology such as software programs for word

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	processing spreadsheets, presentation and scheduling

Packaging Rules

Total number of units = 13

2 core units plus

11 elective units

5 elective units must be selected from the **Group A** units listed below.

4 elective units must be selected from the **Group B** units listed below.

The remaining **2 elective units** may be selected from the **Group A**, **Group B** or **Group C** units listed below, or any currently endorsed Training Package or accredited course at the same qualification level or one level higher or lower.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

IT Use

BSBITU307A Develop keyboarding speed and accuracy

Occupational Health and Safety

BSBOHS201A Participate in OHS processes

OR

BSBOHS306B Contribute to implementing emergency prevention activities and response procedures

Elective units

Group A units

Legal Services Administration

BSBLEG301A Apply knowledge of the legal system to complete tasks

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BSBLEG302A	Carry out search of the public record
BSBLEG303A	Deliver court documentation
BSBLEG304A	Apply the principles of confidentiality and security within the legal environment
BSBLEG305A	Use legal terminology in order to carry out tasks
BSBLEG306A	Maintain records for time and disbursements in a legal practice
BSBLEG308A	Assist in prioritising and planning activities in a legal practice

Information Management

BSBINM303A	Handle receipt and despatch of information

Group B units

Financial Administration

BSBFIA302A Process payroll

BSBFIA303A Process accounts payable and receivable

BSBFIA304A Maintain a general ledger

General Administration

BSBADM307B	Organise schedules

IT Use

BSBITU302B Create electronic presentations

BSBITU304A Produce spreadsheets

BSBITU303A Design and produce text documents

BSBITU306A Design and produce business documents

BSBITU309A Produce desktop published documents

Writing

BSBWRT301A	Write simple documents

Group C units

Customer Service

BSBCUS301B	Deliver and monitor a service to customers

Diversity

BSBDIV301A Work effectively with diversity

Financial Administration

BSBFIA301A Maintain financial records

General Administration

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BSBADM302B Produce texts from notes

BSBADM303B Produce texts from audio transcription

BSBADM311A Maintain business resources

Information Management

BSBINM301A Organise workplace information

BSBINM302A Utilise a knowledge management system

Innovation

BSBINN201A Contribute to workplace innovation

Interpersonal Communication

BSBCMM301B Process customer complaints

IT Use

BSBITU301A Create and use databases

BSBITU305A Conduct online transactions

Occupational Health and Safety

BSBOHS407A Monitor a safe workplace

Product Skills and Advice

BSBPRO301A Recommend products and services

Sustainability

BSBSUS201A Participate in environmentally sustainable work practices

Workplace Effectiveness

BSBWOR204A Use business technology

BSBWOR301B Organise personal work priorities and development

BSBWOR302A Work effectively as an off-site worker

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BSB31107 Certificate III in Business Administration (Medical)

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Unit codes updated: • BSBCMM301A now BSBCMM301B • BSBCUS301A now BSBCUS301B • BSBWOR301A now BSBWOR301B

Description

Descriptor

This qualification reflects the role of individuals who apply a broad range of competencies in various medical administration contexts. They may exercise discretion and judgement using appropriate knowledge to provide technical advice and support to a team.

Job Roles

- Medical Receptionist
- Medical Records Clerk
- Medical Secretary.
-

Pathways Information

Qualification Pathways

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB20107 Certificate II in Business or other relevant qualification/s

OR

- with vocational experience assisting in a range of support roles without a formal business qualification.

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Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Administration Assistant
- Clerical Worker
- Data Entry Operator
- Information Desk Clerk
- Office Junior
- Receptionist.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB40507 Certificate IV in Business Administration.
-

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

BSB31107 Certificate III in Business Administration (Medical)

The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• clearly communicating workplace information to others (verbal

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	and non-verbal) • communicating sensitively in a cross-cultural context • communicating with colleagues and clients to handle verbal inquiries such as payroll questions, medical appointments or records enquiries • communicating with people who speak languages other than English • interpreting needs of clients (internal or external) • reading and interpreting workplace related documentation • writing to audience needs
Teamwork	• applying knowledge of own role to complete activities efficiently to support team activities and tasks • working in a team of people to provide office and medical administration services • working with diverse individuals and groups
Problem-solving	• developing practical responses to common breakdowns in workplace systems and procedures • rectifying discrepancies or errors in documentation and transactions • taking action to resolve concerns
Initiative and enterprise	• adapting to new and emerging situations in the workplace • being proactive and creative in responding to workplace problems, changes and challenges
Planning and organising	• allocating resources to workplace tasks and requirements • collecting, analysing and organising workplace data • identifying risk factors and taking action to minimise risk • organising meeting schedules for clients and colleagues and negotiating alternative arrangements • planning for contingencies • planning information and documentation requirements • utilising or determining required resources
Self-management	• following workplace documentation such as codes of practice or operating procedures • projecting a professional image when representing the organisation • setting own work program and managing time to ensure tasks are done on time • taking personal responsibility at the appropriate level • working ethically when dealing with financial transactions
Learning	• maintaining continuous learning by seeking out opportunities for improvement and developing new skills • seeking assistance and expert advice

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Technology	• using business related technology safely (OHS) • using business technology such as software programs for word processing spreadsheets, presentation and scheduling

Packaging Rules

Total number of units = 13

2 core units plus

11 elective units

5 elective units must be selected from the **Group A units** listed below.

4 elective units must be selected from the **Group B units** listed below.

The remaining **2 elective units** may be selected from **Group A**, **Group B** or **Group C** units listed below, or any currently endorsed Training Package or accredited course at the same qualification level or one level higher or lower.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

IT Use

BSBITU307A Develop keyboarding speed and accuracy

Occupational Health and Safety

BSBOHS201A Participate in OHS processes

OR

BSBOHS306B Contribute to implementing emergency prevention activities and response procedures

Elective units

Group A units

Medical Services Administration

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BSBMED301B Interpret and apply medical terminology appropriately

BSBMED302B Prepare and process medical accounts

BSBMED303B Maintain patient records

BSBMED304B Assist in controlling stocks and supplies

BSBMED305B Apply the principles of confidentiality, privacy and security within the medical environment

BSBMED401B Manage patient record keeping system

Group B units

Financial Administration

BSBFIA302A Process payroll

BSBFIA303A Process accounts payable and receivable

BSBFIA304A Maintain a general ledger

General Administration

BSBADM307B Organise schedules

IT Use

BSBITU302B Create electronic presentations

BSBITU303A Design and produce text documents

BSBITU304A Produce spreadsheets

BSBITU306A Design and produce business documents

BSBITU309A Produce desktop published documents

Writing

BSBWRT301A Write simple documents

Group C Units

Customer Service

BSBCUS301B Deliver and monitor a service to customers

Diversity

BSBDIV301A Work effectively with diversity

Financial Administration

BSBFIA301A Maintain financial records

General Administration

BSBADM302B Produce texts from notes

BSBADM303B Produce texts from audio transcription

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BSBADM311A Maintain business resources

Information Management

BSBINM301A Organise workplace information

BSBINM302A Utilise a knowledge management system

BSBINM303A Handle receipt and despatch of information

Innovation

BSBINN201A Contribute to workplace innovation

Interpersonal Communication

BSBCMM301B Process customer complaints

IT Use

BSBITU301A Create and use databases

BSBITU305A Conduct online transactions

Occupational Health and Safety

BSBOHS407A Monitor a safe workplace

Product Skills and Advice

BSBPRO301A Recommend products and services

Sustainability

BSBSUS201A Participate in environmentally sustainable work practices

Workplace Effectiveness

BSBWOR204A Use business technology

BSBWOR301B Organise personal work priorities and development

BSBWOR302A Work effectively as an off-site worker

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BSB40107 Certificate IV in Advertising

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Unit codes updated: • BSBCUS401A now BSBCUS401B • BSBCUS402A now BSBCUS402B • BSBITS401A now BSBITS401B

Description

Descriptor

This qualification reflects the role of individuals who use well-developed advertising skills and a broad knowledge base in a wide variety of advertising contexts. They apply solutions to a defined range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others with some limited responsibility for the output of others, however they typically report to a more senior advertising practitioner.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- account coordinator
- assistant art director
- assistant account planner
- copywriter
- media assistant
- media buyer
- media planner.
-

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Pathways Information

Qualification pathways

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB30110 Certificate III in Business or other relevant qualification

or

- with vocational experience in assisting advertising team leaders, supervisors or managers to conduct advertising activities but without formal advertising qualifications.

Pathways from the qualification

- BSB50107 Diploma of Advertising or a range of other Diploma qualifications
-

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

BSB40107 Certificate IV in Advertising

The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability skill	**Industry or enterprise requirements for this qualification include**:
Communication	• interpreting the needs of internal and external customers • listening to and understanding workplace information
Teamwork	• applying teamwork skills to a range of workplace situations • seeking feedback from colleagues about work performance

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Problem-solving	• determining the effect of a delay in an aspect of production of an advertising campaign • determining the target market for a product or service • making changes to draft advertisements in response to pre-test information
Initiative and enterprise	• adapting to new and emerging situations • being creative in response to workplace problems, changes and challenges arising from advertising campaign testing
Planning and organising	• collecting, analysing and organising workplace data • scheduling production activities for advertising campaigns
Self-management	• following workplace documentation, such as codes of practice and operating procedures • monitoring and obtaining feedback on work performance and development
Learning	• identifying new skills and professional development activities • researching and acting on opportunities for improvement and sources of learning
Technology	• monitoring technological developments and responding accordingly • using business technology to record and analyse data

Packaging Rules

Total number of units = 10

5 core units *plus*

5 elective units

3 of the elective units must be selected from the elective units listed below.

2 elective units may be selected from elective units listed below, from this Training Package or from any current accredited course or endorsed Training Package. If not listed below, one unit may be selected from either a Certificate III or Diploma level.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

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Core units

BSBADV402B	Conduct pre-campaign testing
BSBADV403B	Monitor advertising production
BSBADV404B	Schedule advertisements
BSBMKG401B	Profile the market
BSBMKG402B	Analyse consumer behaviour for specific markets

Elective units

Advertising

BSBADV405A	Perform media calculations
BSBADV406A	Buy and monitor media
BSBADV407A	Apply media analysis and processing tools
BSBADV408A	Review advertising media options
BSBADV503B	Coordinate advertising research
BSBADV507B	Develop a media plan
BSBADV509A	Create mass print media advertisements
BSBADV510A	Create mass electronic media advertisements
BSBMKG523A	Design and develop an integrated marketing communication plan

Creative thinking

BSBCRT501A	Originate and develop concepts

Customer service

BSBCUS401B	Coordinate implementation of customer service strategies
BSBCUS402B	Address customer needs

Financial administration

BSBFIA402A Report on financial activity

General administration

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BSBADM409A Coordinate business resources

Interpersonal communication

BSBCMM401A Make a presentation

IT support

BSBITS401B Maintain business technology

Marketing

BSBMKG408B Conduct market research

BSBMKG409A Design direct response offers

BSBMKG412A Conduct e-marketing communications

BSBMKG413A Promote products and services

BSBMKG414B Undertake marketing activities

Occupational health and safety

BSBOHS407A Monitor a safe workplace

Public relations

BSBPUB401A Develop and apply knowledge of public relations industry

BSBPUB402A Develop public relations campaigns

BSBPUB403A Develop public relations documents

Product skills and advice

BSBPRO401A Develop product knowledge

Relationship management

BSBREL401A Establish networks

BSBREL402A Build client relationships and business networks

Research

BSBRES401A Analyse and present research information

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Risk management

BSBRSK401A	Identify risk and apply risk management processes

Sustainability

BSBSUS301A	Implement and monitor environmentally sustainable work practices

Writing

BSBWRT401A	Write complex documents
BSBWRT501A	Write persuasive copy

Imported units

CUFWRT401A	Edit text
CUFWRT402A	Write extended stories

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BSB40110 Certificate IV in Legal Services

Modification History

Not applicable.

Description

Descriptor

This qualification reflects the role of individuals who use well-developed skills and a broad knowledge base to provide support in a range of legal service settings. They apply solutions to a range of unpredictable problems, and analyse and evaluate information from a variety of sources.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- legal assistant
- legal secretary
- legal support officer
- assistant paralegal.
-

Pathways Information

Qualification pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- after achieving BSB31007 Certificate III in Business Administration (Legal) or other relevant qualifications

OR

- providing evidence of the completion of all units of competency required for BSB31007 Certificate III in Business Administration (Legal) or other relevant qualifications; with evidence of competency in BSBITU307A Develop keyboarding speed and accuracy being mandatory

OR

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- with some vocational experience working in a range of business settings in support roles without a formal qualification.

Pathways from the qualification

After achieving BSB40110 Certificate IV in Legal Services, candidates may undertake:

- BSB50110 Diploma of Legal Services or a range of other qualifications at diploma level.
-

Licensing/Regulatory Information

Licensing, **legislative**, **regulatory or certification considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
BSB40110 Certificate IV in Legal Services The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating ideas and arguments logically and discretely • communicating with legal practitioners and clients • using clear, sequential instructions and strategies to confirm and clarify understanding • using legal terminology, and reading and interpreting legal documents
Teamwork	• promoting teamwork and providing assistance to co-workers • working under the instruction of a legal practitioner
Problem-solving	• identifying gaps, irregularities and uncertainties in information and following standard resolution procedures • using discretion and judgement, and working within codes of conduct

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Initiative and enterprise	• researching and locating information • suggesting improvements, and designing and structuring documents
Planning and organising	• arranging documents and exhibits to support litigators • keeping paperwork up-to-date and organising information • planning and prioritising work
Self-management	• conducting business according to organisational goals, values and standards • following confidentiality, security and discretion procedures • working within accepted codes of conduct, resolving conflicts of interest and behaving with honesty and integrity • working within own scope of responsibility
Learning	• extending understanding of legal terminology • giving instructions to others that are clear and have adequate explanation • identifying and addressing own additional skill requirements

Technology	• selecting and using:
	  • business technology, such as email, websites, voice mail, audio cassettes, computers and software
	  • online services to communicate, research and report

Packaging Rules

Packaging Rules

Total number of units = 12

8 core units *plus*

4 elective units

The **4 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below **1 elective unit** may be selected from either a Certificate III or Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

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Core units

BSBCMM402A Implement effective communication strategies

BSBCOM406A Conduct work within a compliance framework

BSBLEG413A Identify and apply the legal framework

BSBLEG414A Establish and maintain a file in legal services

BSBLEG418A Produce complex legal documents

BSBLEG415A Apply the principles of contract law

BSBLEG416A Apply the principles of the law of torts

BSBRES404A Research legal information using primary sources

Elective units

BSBINN501A Establish systems that support innovation

BSBINN502A Build and sustain an innovative work environment

BSBLEG403B Maintain trust accounts

BSBLEG417A Apply the principles of evidence law

BSBSUS201A Participate in environmentally sustainable work practices

BSBSUS301A Implement and monitor environmentally sustainable work practices

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BSB40207 Certificate IV in Business

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed Unit codes updated: • BSBCUS401A now BSBCUS401B • BSBCUS402A now BSBCUS402B • BSBCUS403A now BSBCUS403B • BSBITS401A now BSBITS401B

Description

Descriptor

This qualification reflects the role of individuals who use well-developed skills and a broad knowledge base in a wide variety of contexts. They apply solutions to a defined range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others with some limited responsibility for the output of others.

Job Roles

- Administrator
- Project Officer.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

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Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB30107 Certificate III in Business or other relevant qualification/s

OR

- with vocational experience assisting in a range of environments providing administrative or operational support to individuals and/or teams but without a formal business qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Accounts Clerk
- Customer Service Advisor
- Clerk
- E-business Practitioner
- Legal Receptionist
- Medical Receptionist
- Office Administration Assistant
- Student Services Officer
- Word Processing Operator.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- a range of Diploma level qualifications within the BSB07 Business Services Training Package, or other Training Packages.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

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Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating with business contacts and team members to promote products and services, give and receive feedback, and negotiate effectively to address conflicts • reading, interpreting, writing and presenting reports
Teamwork	• supporting team members in developing skills and knowledge relating to products and services • working within own role to support team activities
Problem-solving	• finding, analysing and interpreting data which may be incomplete or have discrepancies • making decisions to complete tasks in a time efficient manner
Initiative and enterprise	• contributing to strategic direction of enterprise • identifying learning opportunities to improve work practices
Planning and organising	• organising information relating to products and/or services into databases • organising resources, equipment and time lines • planning for contingencies
Self-management	• evaluating own performance and identifying areas for improvement • managing time to independently complete tasks
Learning	• participating in professional networks and associations to obtain and maintain knowledge and skills
Technology	• using business technology such as the internet and mobile phones to communicate with other people • using business technology to collect, analyse and provide information

Packaging Rules

Total number of units = 10

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1 core unit plus

9 elective units

5 elective units must be selected from the elective units listed below.

The remaining **4 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from either a Certificate III or Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Where the packaging of this qualification meets the rules of a specialist qualification at this level, then the specialist qualification and not the generic qualification must be awarded.

Core units

Occupational Health and Safety

BSBOHS407A	Monitor a safe workplace

Elective units

Customer Service

BSBCUS401B	Coordinate implementation of customer service strategies
BSBCUS402B	Address customer needs
BSBCUS403B	Implement customer service standards

Continuity

BSBCON401A	Work effectively in a business continuity context

E-Business

BSBEBU401A	Review and maintain a website

Financial Administration

BSBFIA402A	Report on financial activity

General Administration

BSBADM405B	Organise meetings
BSBADM409A	Coordinate business resources

Innovation

BSBINN301A	Promote innovation in a team environment

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Intellectual Property

BSBIPR401A Use and respect copyright

BSBIPR402A Protect and use new inventions and innovations

BSBIPR403A Protect and use brands and business identity

BSBIPR404A Protect and use innovative designs

BSBIPR405A Protect and use intangible assets in small business

Interpersonal Communication

BSBCMM401A Make a presentation

IT Analysis and Design

BSBITA401A Design databases

IT Support

BSBITS401B Maintain business technology

IT Use

BSBITU401A Design and develop complex text documents

BSBITU402A Develop and use complex spreadsheets

BSBITU404A Produce complex desktop published documents

Learning and Development

BSBLED401A Develop teams and individuals

Marketing

BSBMKG413A Promote products and services

BSBMKG414B Undertake marketing activities

Project Management

BSBPMG510A Manage projects

Recordkeeping

BSBRKG402B Provide information from and about records

Relationship Management

BSBREL401A Establish networks

Research

BSBRES401A Analyse and present research information

Risk Management

BSBRSK401A Identify risk and apply risk management processes

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

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Writing

BSBWRT401A Write complex documents

•

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BSB40311 Certificate IV in Customer Contact

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* *Replaces* BSB40307 Certificate IV in Customer Contact

Description

This qualification reflects the role of individuals who typically undertake complex customer interactions, often as a team leader and with significant authority to delegate.

Duties at this level may include using multi-channel communications; receiving and responding to complex customer requests or enquiries; handling customer complaints; applying key performance indicators; leading a team; coaching staff; scheduling and organising; and gathering, interpreting and organising data capture.

Candidates undertaking this qualification require sound communication and interpersonal skills.

They may provide technical advice and support to a team.

Job roles

Possible job roles relevant to this qualification include:

- contact centre team leader
- quality assurance coordinator
- customer contact coach
- analyst
- scheduler
- complex enquiry customer contact operator.

Pathways Information

Pathways into the qualification

Preferred pathway for candidates considering this qualification include:

- BSB30211 Certificate III in Customer Contact or other relevant qualifications
- vocational experience assisting in a range of support roles without a formal business qualification.

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Pathways from the qualification

BSB50311 Diploma of Customer Contact or a range of other Diploma qualifications.

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability skill	Industry/enterprise requirements for this qualification include:
Communication	• transferring information centre's operational plans, goals, new products and services to team and project members • reading and interpreting a range of reports and information • writing team and project plans, documents and reports
Teamwork	• developing a team culture and identity • managing a team and applying knowledge of one’s own role to achieve team goals • working with diverse persons and groups
Problem-solving	• analysing information and reports • dealing with complex customer complaints and escalations • working through alternatives and improvements
Initiative and enterprise	• contributing to suggestions for improvements to products, services and processes • supporting operational plans and organisational goals
Planning and organising	• developing team plans • managing learning and development plans for team members • planning team resources, targets and performance levels
Self-management	• managing own performance and motivating others • managing own time and work priorities • managing stress in the workplace

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Employability skill	Industry/enterprise requirements for this qualification include:
Learning	• learning new ideas, skills and techniques • providing appropriate information on systems, products and services to team members
Technology	• using electronic communication devices and processes to support team management, i.e. internet, intranet, telephony equipment, software packages, enterprise systems and email • using technology to assist the manipulation of information and to maximise performance

Packaging Rules

Total number of units = 13

3 core units *plus*

10 elective units of which:

- 4 units must be from Group A elective units below
- the remaining 6 units may be from Group A or Group B elective units, or from qualifications at the same level or one higher in any endorsed Training Package or accredited course
- up to 2 units may be from a Certificate III level qualification.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBCUS401B Coordinate implementation of customer service strategies

BSBLED401A Develop teams and individuals

BSBOHS407A Monitor a safe workplace

Elective units

Group A

BSBCCO403A Schedule customer contact activity

BSBCCO404A Collect, analyse and record information

BSBCCO405A Survey stakeholders to gather and record information

BSBCCO406A Run a multicentre

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BSBCCO407A Administer customer contact technology

BSBCUS402B Address customer needs

BSBCUS403B Implement customer service standards

BSBMGT401A Show leadership in the workplace

BSBMKG402B Analyse consumer behaviour for specific markets

BSBWOR403A Manage stress in the workplace

Group B

BSBCOM401B Organise and monitor the operation of compliance management system

BSBCOM402B Implement processes for the management of a breach in compliance requirements

BSBCOM403B Provide education and training on compliance requirements and systems

BSBCOM404B Promote and liaise on compliance requirements, systems and related issues

BSBHRM402A Recruit, select and induct staff

BSBINM401A Implement workplace information system

BSBINN301A Promote innovation in a team environment

BSBLED501A Develop a workplace learning environment

BSBMGT402A Implement operational plan

BSBMGT403A Implement continuous improvement

BSBMGT405A Provide personal leadership

BSBPMG404A Apply quality management techniques

BSBPMG407A Apply risk management techniques

BSBPMG510A Manage projects

BSBSLS501A Develop a sales plan

BSBSLS502A Lead and manage a sales team

BSBSUS301A Implement and monitor environmentally sustainable work practices

BSBWOR401A Establish effective workplace relationships

CHCINF505C Meet statutory and organisation information requirements

CHCPOL403B Undertake research activities

ICASAS305A Provide IT advice to clients

Custom Content Section

Not applicable.

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BSB40407 Certificate IV in Small Business Management

Modification History

Release	Comments

Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*.
	• Elective unit FNSACCT407B replaced with FNSACC406A.
	• SIRXQUA002A included as an elective unit.
	• Outdated advice removed
	• Unit codes updated:
	  • BSBCUS401A now BSBCUS401B
	  • BSBCUS402A now BSBCUS402B
	  • BSBSMB405A now BSBSMB405B

Description

Descriptor

This qualification reflects the role of individuals who use well-developed skills and a broad knowledge base in a wide variety of small business contexts. They apply solutions to a defined range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others, and have responsibility for the output of others.

Job Roles

- Small Business Manager.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

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Candidates may enter the qualification through a number of entry points demonstrating potential to undertake vocational education and training at certificate level, including:

- with personal or vocational experience in a specific industry
- with vocational experience in a specific industry and an industry specific qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake a qualification in a specialist area within this Training Package such as marketing, management, human resources.

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• being appropriately assertive when marketing the business • negotiating effectively • persuading effectively with clients, suppliers, financial backers and other business stakeholders • reading, interpreting and questioning legal, financial, marketing and other business documentation
Teamwork	• identifying and utilising the strengths of other team members • providing coaching, mentoring and feedback to members of the team

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Problem-solving	• applying a range of problem solving strategies • seeking information from various sources to determine the cause of the problem • using numeracy skills to calculate costs, prices and cash flow projections
Initiative and enterprise	• being creative and entrepreneurial in translating small business ideas into action • developing innovative solutions to small business challenges • identifying small business opportunities not obvious to others
Planning and organising	• developing a business plan • developing operational procedures for the small business • identifying performance measures for the small business • planning for contingencies
Self-management	• having personal goals and a vision for the small business • taking personal responsibility for the business
Learning	• contributing to the learning of team members • seeking assistance and expert advice on financial, legal and/or technical aspects of the business • seeking out and learning new ideas, skills and techniques
Technology	• applying business technology for communication, planning, financial management, marketing and operating the business • comparing and purchasing new business technology

Packaging Rules

Total number of units = 10

4 core units plus

6 elective units

The **6 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 elective unit** may be selected from a Certificate III or Diploma qualification.

Electives must be relevant to the work outcome, local industry requirements and the qualification level.

Core Units

Small and Micro Business

BSBSMB401A Establish legal and risk management requirements of small business

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BSBSMB402A	Plan small business finances
BSBSMB403A	Market the small business
BSBSMB404A	Undertake small business planning

Elective Units

Creative Thinking

BSBCRT501A	Originate and develop concepts

Customer Service

BSBCUS401B	Coordinate implementation of customer service strategies
BSBCUS402B	Address customer needs

E-Business

BSBEBU401A	Review and maintain a website

Financial Administration

BSBFIA402A	Report on financial activity

Franchising

BSBFRA401B	Manage compliance with franchisee obligations and legislative requirements

Innovation

BSBINN301A	Promote innovation in a team environment

Intellectual Property

BSBIPR405A	Protect and use intangible assets in small business

International Business

BSBINT303B	Organise the importing and exporting of goods

Management

BSBMGT404A	Lead and facilitate off-site staff

Marketing

BSBMKG413A	Promote products and services
BSBMKG414B	Undertake marketing activities

Project Management

BSBPMG510A	Manage projects

Relationship Management

BSBREL401A	Establish networks
BSBREL402A	Build client relationships and business networks

Research

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BSBRES401A Analyse and present research information

Small and Micro Business

BSBSMB405B Monitor and manage small business operations

BSBSMB406A Manage small business finances

BSBSMB407A Manage a small team

BSBSMB408B Manage personal, family, cultural and business obligations

BSBSMB409A Build and maintain relationships with small business stakeholders

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

Imported Units

FNSACC406A Set up and operate a computerised accounting system

PSPGOV407B Provide a quotation

SIRXQUA002A Lead a team to foster innovation

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BSB40507 Certificate IV in Business Administration

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed Unit codes updated: • BSBCUS401A now BSBCUS401B • BSBCUS402A now BSBCUS402B • BSBITS401A now BSBITS401B

Description

Descriptor

This qualification reflects the role of individuals who use well-developed administrative skills and a broad knowledge base in a wide variety of administrative contexts. They apply solutions to a defined range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others with some limited responsibility for the output of others.

Job Roles

- Accounts Supervisor
- Executive Personal Assistant
- Office Administrator
- Project Assistant.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

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Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB30407 Certificate III in Business Administration or other relevant qualification/s

OR

- vocational experience in providing administrative or operational support to individuals and/or teams but without a formal business administration qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Accounts Receivable Clerk
- Accounts Payable Clerk
- Clerk
- Data Entry Operator
- Junior Personal Assistant
- Medical Records Officer
- Receptionist
- Office Administration Assistant
- Office Administrator
- Word Processing Operator.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB50407 Diploma of Business Administration.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

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Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating with colleagues and customers to gather information about their needs and to provide services • listening to and following complex oral instructions • proofreading and editing • writing clear and detailed instructions
Teamwork	• agreeing on the purpose and structure of documents, spreadsheets and databases with colleagues and clients • collecting feedback from customers and colleagues • coordinating and consulting with meeting participants • referring queries to colleagues
Problem-solving	• analysing document requirements and using online help, manuals and user documentation • determining appropriate strategies to respond to user requests • diagnosing customer service complaints and taking steps to improve the service • making decisions about classification and storage of records
Initiative and enterprise	• designing complex documents, databases and spreadsheets • evaluating tasks to improve efficiency • suggesting improvements to the structure and design of existing systems
Planning and organising	• organising resources, equipment and time lines • organising work schedules and meetings • planning future business technology requirements • planning task organisation to meet time lines
Self-management	• evaluating own performance and identifying areas for improvement • managing time and ensuring ergonomic requirements are met • planning and reviewing own work • using judgement and discretion with confidential information
Learning	• actively participating in coaching and mentoring sessions to improve standards of service provision • attending training/induction in the use of administrative systems

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Technology	• maintaining existing business technology and planning for future requirements • using business technology such as computers, word processing programs and printers

Packaging Rules

Total number of units = 10

10 elective units

5 elective units must be selected from the **Group A** units listed below.

The remaining **5 elective units** may be selected from the **Group A or Group B** unit listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 elective unit** may be selected from either a Certificate III or Diploma qualification.

BSBITU307A Develop keyboarding speed and accuracy cannot be selected as an elective unit for this qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Elective units

Group A units

Financial Administration

BSBFIA401A Prepare financial reports

General Administration

BSBADM401B Produce complex texts from shorthand notes

BSBADM405B Organise meetings

BSBADM406B Organise business travel

BSBADM411A Produce complex texts from audio transcription

Information Management

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BSBINM401A Implement workplace information system

IT Analysis and Design

BSBITA401A Design databases

IT Use

BSBITU401A Design and develop complex text documents

BSBITU402A Develop and use complex spreadsheets

BSBITU404A Produce complex desktop published documents

Writing

BSBWRT401A Write complex documents

Group B units

Customer Service

BSBCUS401B Coordinate implementation of customer service strategies

BSBCUS402B Address customer needs

E-Business

BSBEBU401A Review and maintain a website

Financial Administration

BSBFIA402A Report on financial activity

General Administration

BSBADM407B Administer projects

BSBADM409A Coordinate business resources

Innovation

BSBINN301A Promote innovation in a team environment

Interpersonal Communication

BSBCMM401A Make a presentation

IT Support

BSBITS401B Maintain business technology

Marketing

BSBMKG413A Promote products and services

BSBMKG414B Undertake marketing activities

Medical Services Administration

BSBMED401B Manage patient record keeping system

Occupational Health and Safety

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BSBOHS407A Monitor a safe workplace

Relationship Management

BSBREL401A Establish networks

Research

BSBRES401A Analyse and present research information

Risk Management

BSBRSK401A Identify risk and apply risk management processes

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

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BSB40610 Certificate IV in Business Sales

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Codes of some units have been updated.

Description

Descriptor

This qualification reflects the role of individuals who use well-developed business sales skills and a broad knowledge base in a wide variety of business sales contexts. They apply solutions to a defined range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others and have limited responsibility for the output of others, however they typically report to a more senior business sales practitioner.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- sales account assistant
- sales agent
- sales representative.
-

Pathways Information

Qualification pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB30110 Certificate III in Business or other relevant qualification

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or

- with vocational experience in assisting sales team leaders, supervisors or managers to conduct sales activities but without a formal sales qualification.

Pathways from the qualification

- BSB51207 Diploma of Marketing or a range of other Diploma qualifications
-

Licensing/Regulatory Information

Licensing, legislative, regulatory or certification considerations

There is no direct link between this qualification and licensing, legislative or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
BSB40610 Certificate IV in Business Sales The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability skill	**Industry or enterprise requirements for this qualification include**:
Communication	• being appropriately assertive with clients and client representatives • establishing and using appropriate formal or informal business networks • establishing rapport and relationships with client and client representatives • using gestures, posture, body language, facial expressions and voice to create a supportive selling environment

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Teamwork	• identifying and using the strengths of other sales team members to promote the attainment of sales objectives • working as an individual or as part of a sales team to conduct sales activities and to support other team members in achieving sales targets and objectives
Problem-solving	• identifying and addressing reasons for potential buyer reluctance to purchase • refining the system of recording prospect information based on an evaluation
Initiative and enterprise	• identifying and presenting options for cross-selling or up-selling • using initiative to develop sales prospects and lists of potential buyers
Planning and organising	• collecting the names of potential buyers likely to be interested in purchasing a product or service • pipelining and planning sales activities to identify sales solutions and prospects • securing sales prospects and supporting post-sale activities
Self-management	• establishing an individualised sales plan • managing stress, time and sales-related paperwork effectively
Learning	• acquiring knowledge of products or services • obtaining feedback on the sales process and product or service satisfaction from customers
Technology	• using business technology to process orders • using the internet to obtain product information

Packaging Rules

Total number of units = 10

4 core units *plus*

6 elective units

4 elective units must be selected from the elective units listed below.

2 elective units may be selected from the elective units listed below, from this Training Package or from any current accredited course or endorsed Training Package

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at this qualification level or Certificate III or Diploma level.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

BSBPRO401A Develop product knowledge

BSBREL402A Build client relationships and business networks

BSBSLS407A Identify and plan sales prospects

BSBSLS408A Present, secure and support sales solutions

Elective units

Customer service

BSBCUS401B Coordinate implementation of customer service strategies

BSBCUS402B Address customer needs

Financial administration

BSBFIA402A Report on financial activity

General administration

BSBADM405B Organise meetings

BSBADM406B Organise business travel

BSBADM409A Coordinate business resources

International business

BSBINT401B Research international business opportunities

Interpersonal communication

BSBCMM401A Make a presentation

IT use

BSBITU301A Create and use databases

BSBITU402A Develop and use complex spreadsheets

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Marketing

BSBMKG401B	Profile the market
BSBMKG402B	Analyse consumer behaviour for specific markets
BSBMKG408B	Conduct market research
BSBMKG413A	Promote products and services
BSBMKG414B	Undertake marketing activities
BSBMKG415A	Research international markets
BSBMKG416A	Market goods and services internationally

Occupational health and safety

BSBOHS407A	Monitor a safe workplace

Relationship management

BSBREL401A	Establish networks
BSBREL403A	Implement international client relationship strategies

Research

BSBRES401A	Analyse and present research information

Sales

BSBSLS501A	Develop a sales plan
BSBSLS502A	Lead and manage a sales team

Sustainability

BSBSUS301A	Implement and monitor environmentally sustainable work practices

Workplace effectiveness

BSBWOR401A	Establish effective workplace relationships
BSBWOR402A	Promote team effectiveness

Imported units

FNSSAM402A	Implement a sales plan

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BSB40707 Certificate IV in Franchising

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed Unit codes updated: • BSBCUS401A now BSBCUS401B • BSBCUS402A now BSBCUS402B • BSBITS401A now BSBITS401B

Description

Descriptor

This qualification reflects the role of individuals who apply well-developed skills and a broad knowledge base in relation to the franchising industry. They may act as a franchisee in any industry area and have managerial responsibilities for the franchise and the relationship with a franchisor.

Job Roles

- Franchisee - of one or more sites of a franchise operation within any industry sector.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

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- BSB30107 Certificate III in Business or other relevant qualification/s

OR

- with vocational experience in small business, management or industry but without formal business qualifications.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Accounts Clerk
- Customer Service Advisor
- Import/Export Clerk
- Office Administrator.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may wish to undertake:

- BSB51107 Diploma of Management
- BSB50507 Diploma of Franchising.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY
The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating the organisation's business practices systems and processes to individuals and teams • negotiating and resolving disputes with franchisors
Teamwork	• forming networks of franchisees to inform best practice • using systems and strategies to actively encourage the team to conduct franchise business processes
Problem-solving	• developing strategies for compliance with franchisee obligations and legislative requirements • solving problems and disputes arising in the course of business operations and with franchisors
Initiative and enterprise	• exercising initiative to contribute to continuous improvement • generating a range of options to overcome common operational difficulties
Planning and organising	• developing a financial plan to support business viability • planning for the management of a multiple site franchise by implementing and monitoring the plan
Self-management	• obtaining feedback on work performance and development • planning own work schedules
Learning	• completing training on meeting franchisee requirements such as first aid, occupational health and safety, food handling • mentoring and coaching individuals and teams in continuous improvement processes
Technology	• using computer systems and telecommunications devices to meet business needs and to compile activity and financial reports

Packaging Rules

Total number of units = 10

3 core units plus

7 elective units

At least **5 elective units** must be selected from the elective units listed below.

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The remaining **2 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from either a Certificate III or Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

Franchising

BSBFRA401B	Manage compliance with franchisee obligations and legislative requirements
BSBFRA402B	Establish a franchise
BSBFRA403B	Manage relationship with franchisor

Elective units

Creative Thinking

BSBCRT501A	Originate and develop concepts

Customer Service

BSBCUS401B	Coordinate implementation of customer service strategies
BSBCUS402B	Address customer needs

Financial Administration

BSBFIA402A Report on financial activity

Franchising

BSBFRA301B	Work within a franchise
BSBFRA404B	Manage a multiple site franchise

General Administration

BSBADM409A	Coordinate business resources

Intellectual Property

BSBIPR405A Protect and use intangible assets in small business

Interpersonal Communication

BSBCMM401A	Make a presentation

IT Support

BSBITS401B Maintain business technology

IT Use

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BSBITU401A Design and develop complex text documents

Learning and Development

BSBLED401A Develop teams and individuals

Marketing

BSBMKG413A Promote products and services

BSBMKG414B Undertake marketing activities

Occupational Health and Safety

BSBOHS407A Monitor a safe workplace

Relationship Management

BSBREL401A Establish networks

Research

BSBRES401A Analyse and present research information

Risk Management

BSBRSK401A Identify risk and apply risk management processes

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

Writing

BSBWRT401A Write complex documents

•

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BSB40807 Certificate IV in Frontline Management

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed Unit codes updated: • BSBCUS401A now BSBCUS401B • BSBCUS402A now BSBCUS402B • BSBCUS403A now BSBCUS403B • BSBITS401A now BSBITS401B • BSBRKG403B now BSBRKG403C

Description

Descriptor

This qualification reflects the role of individuals who take the first line of management in a wide range of organisational and industry contexts. They may have existing qualifications and technical skills in any given vocation or profession, yet require skills or recognition in supervisory functions. Typically they would report to a manager.

At this level frontline managers provide leadership and guidance to others and take responsibility for the effective functioning and performance of the team and its work outcomes.

Job Roles

- Coordinator
- Leading Hand
- Supervisor
- Team Leader.
-

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Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB31207 Certificate III Frontline Management or other relevant qualification/s

OR

- with vocational experience in a supervisory role but no formal qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Accounts Clerk
- Customer Service Advisor
- Import/Export Clerk
- Office Administrator
- Student Services Officer.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- the BSB51107 Diploma of Management.
-

Licensing/Regulatory Information

Licensing, Legislative, Regulatory or Certification Considerations

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

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Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Qualification Code and Title The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating with team members and management to ensure open communication channels and to clarify issues • resolving conflict and disputes in the work team
Teamwork	• being a role model for other team members • consulting and developing objectives with the work team
Problem-solving	• developing risk management approaches • developing techniques to address faults and inefficiencies
Initiative and enterprise	• identifying and developing opportunities for improved work practices
Planning and organising	• monitoring and adjusting operational performance by producing short-term plans, planning and acquiring resources and reporting on performance • preparing work plans and budgets
Self-management	• actively seeking feedback on own performance from clients and colleagues • prioritising tasks
Learning	• coaching and mentoring colleagues and team members to support the introduction of change
Technology	• using business technology such as computer programs and telecommunications to collect and manage information

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Packaging Rules

Total number of units = 10

4 core units plus

6 elective units

At least **3** of the **elective units** must be selected from the elective units listed below.

The remaining **3 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from either a Certificate III or Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

Management

BSBMGT401A Show leadership in the workplace

BSBMGT402A Implement operational plan

Occupational Health and Safety

BSBOHS407A Monitor a safe workplace

Workplace Effectiveness

BSBWOR402A Promote team effectiveness

Elective units

Customer Service

BSBCUS401B Coordinate implementation of customer service strategies

BSBCUS402B Address customer needs

BSBCUS403B Implement customer service standards

Financial Administration

BSBFIA402A Report on financial activity

General Administration

BSBADM409A Coordinate business resources

Information Management

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BSBINM401A Implement workplace information system

Innovation

BSBINN301A Promote innovation in a team environment

Interpersonal Communication

BSBCMM401A Make a presentation

IT Support

BSBITS401B Maintain business technology

Management

BSBMGT403A Implement continuous improvement

BSBMGT404A Lead and facilitate off-site staff

Marketing

BSBMKG413A Promote products and services

Project Management

BSBPMG510A Manage projects

Relationship Management

BSBREL401A Establish networks

Research

BSBRES401A Analyse and present research information

Risk Management

BSBRSK401A Identify risk and apply risk management processes

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

Workplace Effectiveness

BSBWOR401A Establish effective workplace relationships

BSBWOR404B Develop work priorities

Writing

BSBWRT401A Write complex documents

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BSB40907 Certificate IV in Governance

Modification History

Not applicable.

Description

Descriptor

This qualification reflects the role of individuals who undertake the responsibilities required of a member of a Board of governance of an organisation. They would apply a broad knowledge of the business or core functions of organisations and contribute their skills and knowledge to monitoring and guiding the activities of the organisation at a Board level. They apply solutions to a defined range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others with some limited responsibility for the output of others.

Job Roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- Board Member
- Coordinator of Quality Governance.

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB30107 Certificate III in Business or other relevant qualification/s

OR

- providing evidence of competency in the majority of units required for the BSB30107 Certificate III in Business or other relevant qualification/s

OR

- with some vocational experience in a range of environments working with boards of governance, but with no formal qualification.

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Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Accounts Clerk
- Customer Service Advisor
- Import/Export Clerk
- Legal Secretary
- Office Administrator
- Secretary.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving the BSB40907 Certificate IV in Governance, candidates may undertake a range of Diploma qualifications in the BSB07 Business Services Training Package or other currently endorsed national Training Packages.

Pathways Information

Not applicable.

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY
Qualification Code and Title

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• networking and negotiating with relevant persons • providing information to stakeholders about the organisation's activities and Board decisions
Teamwork	• encouraging a team approach where individuals' contributions are recognised and documented • identifying people and delegating authority to relevant team members • supporting participation in decision making
Problem-solving	• seeking clarification of clauses in the constitution from experts
Initiative and enterprise	• designing the process for the development of policy • questioning outcomes and actions of financial reports
Planning and organising	• planning regular community forums • setting directions for the future of the organisation
Self-management	• adhering to the operational structure of the Board and performing duties as per the job description • modelling respect for the organisation's culture and values
Learning	• promoting and encouraging an environment which allows people to enhance their skills and knowledge • transferring competency to other situations
Technology	• using technology for communication, time scheduling, planning, financial management and asset management

Packaging Rules

Packaging Rules
Total number of units = 10 **3 core units** plus **7 elective** units suggest

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Packaging Rules

At least **4** of the **elective units** must be selected from the elective units listed below.

The remaining **3 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, 1 unit may be selected from a Certificate III or Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Units selected from other Training Packages must not duplicate units selected from or available within the BSB07 Business Services Training Package.

Core units

Governance

BSBGOV401A	Implement Board member responsibilities
BSBGOV402A	Work within organisational structure
BSBGOV403A	Analyse financial reports and budgets

Elective units

Diversity

BSBDIV301A	Work effectively with diversity

General Administration

BSBADM502B	Manage meetings

Project Management

BSBPMG408A	Apply contract and procurement procedures

Relationship Management

BSBREL401A	Establish networks

Risk Management

BSBRSK401A	Identify risk and apply risk management processes

Small and Micro Business

BSBSMB305A	Comply with regulatory, taxation and insurance requirements for the micro business
BSBSMB404A	Undertake small business planning

Sustainability

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Packaging Rules
BSBSUS301A Implement and monitor environmentally sustainable work practices
Writing
BSBWRT401A Write complex documents

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BSB41007 Certificate IV in Human Resources

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed

Description

Descriptor

This qualification reflects the role of individuals who work in a range of support positions in human resources management. In smaller companies they may work across all human resources functional areas and in larger companies they may be assigned responsibilities in units or business areas focussed on discrete human resources functions, such as remuneration, workforce planning or human resources information systems.

Job Roles

- Human Resources Assistant
- Human Resources Officer
- Payroll Officer.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB30107 Certificate III in Business or other relevant qualification/s

OR

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- with vocational experience in assisting human resources team leaders, supervisors or managers in their work but without formal human resource qualifications.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Administration Officer
- Executive Personal Assistant
- Human Resources Clerk
- Office Administrator
- Project Assistant.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB50607 Diploma of Human Resources Management.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY
Qualification Code and Title The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• using communication and representation to develop and maintain effective working relationships and networks • using negotiation and conflict management skills to resolve issues
Teamwork	• actively encouraging consultation and co-operation on human resources initiatives • motivating, mentoring, coaching and developing staff
Problem-solving	• identifying and analysing industrial relations issues, methods to attract job applicants and assisting managers to address performance management issues • implementing processes to resolve issues that are raised by co-workers
Initiative and enterprise	• seeking and valuing contributions to develop and refine new ideas and approaches
Planning and organising	• gathering, organising and presenting workplace information • scheduling interviews and coordinating selection processes
Self-management	• ensuring that key tasks are undertaken to support organisational timeframes for human resources strategies, such as performance appraisal • planning own work including predicting consequences and identifying improvements
Learning	• participating in professional networks and associations to obtain and maintain knowledge and skills
Technology	• selecting and using a range of functions on a computer application • using business technology to produce reports

Packaging Rules

Total number of units = 10

4 core units plus

6 elective units

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3 elective units must be selected from the elective units listed below.

The remaining **3 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from either a Certificate III or Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

Human Resource Management

BSBHRM401A Review human resources functions

BSBHRM402A Recruit, select and induct staff

BSBHRM403A Support performance management process

Workplace Relations

BSBWRK410A Implement industrial relations procedures

Elective units

Customer Service

BSBCUS402B Address customer needs

Financial Administration

BSBFIA402A Report on financial activity

General Administration

BSBADM405B Organise meetings

BSBADM406B Organise business travel

Innovation

BSBINN301A Promote innovation in a team environment

Interpersonal Communication

BSBCMM401A Make a presentation

IT Analysis and Design

BSBITA401A Design databases

IT Use

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BSBITU401A Design and develop complex text documents

BSBITU402A Develop and use complex spreadsheets

BSBITU404A Produce complex desktop published documents

Occupational Health and Safety

BSBOHS407A Monitor a safe workplace

Recordkeeping

BSBRKG404A Monitor and maintain records in an online environment

Recruitment and Employment Services

BSBEMS401B Develop and implement business development strategies to expand client base

BSBEMS402B Develop and implement strategies to source and assess candidates

BSBEMS403B Develop and provide employment management services to candidates

BSBEMS404B Manage the recruitment process for client organisations

Relationship Management

BSBREL401A Establish networks

Research

BSBRES401A Analyse and present research information

Risk Management

BSBRSK401A Identify risk and apply risk management processes

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

Workplace Effectiveness

BSBWOR401A Establish effective workplace relationships

BSBWOR402A Promote team effectiveness

Writing

BSBWRT401A Write complex documents

•

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BSB41107 Certificate IV in International Trade

Modification History

Release	Comments

Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*.
	• Change to packaging rules to include "The remaining 3 elective units may be selected from the remaining Group A or Group B units".
	• Outdated advice removed
	• Unit codes updated:
	  • BSBCUS401A now BSBCUS401B
	  • BSBCUS402A now BSBCUS402B
	  • BSBCUS403A now BSBCUS403B
	  • BSBITS401A now BSBITS401B
	•

Description

Descriptor

This qualification reflects the role of individuals who use well-developed international trade skills and a broad knowledge base in a wide variety of international trade contexts. They apply solutions to a defined range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others with some limited responsibility for the output of others, however they typically report to a more senior international trade/business practitioner.

Job Roles

- Export Customer Service Coordinator
- Exporter
- Importer
- Trade Coordinator.
-

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Pathways Information

Qualification Pathways

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB30607 Certificate III in International Trade or other relevant qualification/s

OR

- with vocational experience in assisting international trade/business team leaders, supervisors or managers to conduct international trade/business activities but without formal international trade qualifications.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Export Clerk
- Import Clerk
- Import/Export Clerk.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB50807 Diploma of International Business.
-

Licensing/Regulatory Information

Licensing, Legislative, Regulatory or Certification Considerations

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

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Employability Skills Summary

BSB41107 Certificate IV in International Trade

The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating with parties, agents, suppliers and customers to ensure business is transacted in an efficient manner • using negotiation skills to obtain new client orders or prices
Teamwork	• consulting with teams and individuals to allocate resources • planning and implementing team activities to meet customer needs
Problem-solving	• using procedures to resolve customer difficulties and complaints • utilising risk management processes to minimise potential adverse impacts and to maintain continuity of operations
Initiative and enterprise	• adapting to new and emerging trends and changes in the international business environment • generating a range of continuous improvement suggestions to improve workplace policies and procedures
Planning and organising	• scheduling shipments so they depart and arrive within clients' required time lines • developing project plans including time lines, task breakdowns, roles and responsibilities
Self-management	• recognising the limitations of own experience and knowledge of international conventions, laws and finance and seeking advice from more experienced people where appropriate • working with attention to detail, thoroughness, accuracy and speed
Learning	• maintaining currency of knowledge and skills of international conventions, laws and finance • reflecting on own performance and analysing how it could be improved in the future
Technology	• using computer-based search technologies to locate learning resources and opportunities • using computer-based software such as word processing and spreadsheets to organise resources

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Packaging Rules

Total number of units = 10

10 elective units

4 elective units must be selected from the **Group A** units listed below.

3 elective units must be selected from the **Group B** units listed below.

The remaining **3 elective units** may be selected from the remaining **Group A or Group B** units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from either a Certificate III or Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Group A units

Compliance

BSBCOM405A Promote compliance with legislation

International Business

BSBINT401B Research international business opportunities

BSBINT405B Apply knowledge of import and export international conventions, laws and finance

BSBINT407B Prepare business advice on export Free on Board Value

BSBINT408B Prepare business advice on the taxes and duties for international trade transactions

BSBINT409B Plan for international trade

Marketing

BSBMKG415A Research international markets

BSBMKG416A Market goods and services internationally

Relationship Management

BSBREL403A Implement international client relationship strategies

Group B units

Customer Service

BSBCUS401B Coordinate implementation of customer service strategies

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BSBCUS402B Address customer needs

BSBCUS403B Implement customer service standards

Financial Administration

BSBFIA402A Report on financial activity

General Administration

BSBADM409A Coordinate business resources

Information Management

BSBINM401A Implement workplace information system

Interpersonal Communication

BSBCMM401A Make a presentation

IT Support

BSBITS401B Maintain business technology

IT Use

BSBITU401A Design and develop complex text documents

Learning and Development

BSBLED401A Develop teams and individuals

Management

BSBMGT401A Show leadership in the workplace

BSBMGT402A Implement operational plan

BSBMGT403A Implement continuous improvement

BSBMGT404A Lead and facilitate off-site staff

Marketing

BSBMKG413A Promote products and services

BSBMKG414B Undertake marketing activities

Occupational Health and Safety

BSBOHS407A Monitor a safe workplace

Relationship Management

BSBREL401A Establish networks

Research

BSBRES401A Analyse and present research information

Risk Management

BSBRSK401A Identify risk and apply risk management processes

Sustainability

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BSBSUS301A Implement and monitor environmentally sustainable work practices

Workplace Effectiveness

BSBWOR401A Establish effective workplace relationships

BSBWOR402A Promote team effectiveness

Writing

BSBWRT401A Write complex documents

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BSB41307 Certificate IV in Marketing

Modification History

Release	Comments
Release 2	Qualification updated in *BSB07 Business Services Training Package version 6.0* Codes of some units have been updated.

Description

Descriptor

This qualification reflects the role of individuals who use well-developed marketing skills and a broad knowledge base in a wide variety of marketing contexts. They apply solutions to a defined range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others with some limited responsibility for the output of others, however they typically report to a more senior marketing practitioner.

Depending on the units selected to form the qualification, candidates may complete a generic marketing qualification or specialise in direct marketing, public relations or international marketing.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- direct marketing officer
- market research assistant
- marketing coordinator
- marketing officer
- public relations officer.
-

Pathways Information

Qualification pathways

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

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- BSB30110 Certificate III in Business or other relevant qualification

or

- with vocational experience in assisting marketing team leaders, supervisors or managers to conduct marketing communication activities but without formal marketing qualifications.

Pathways from the qualification

- BSB51207 Diploma of Marketing or a range of Diploma qualifications
-

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY

BSB41307 Certificate IV in Marketing

The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability skill	**Industry or enterprise requirements for this qualification include**:
Communication	• conducting marketing communications for a variety of target markets or audiences • making a presentation to clients or a group of colleagues
Teamwork	• working with team members to complete marketing communication activities • working with team members to identify and allocate business resources

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Problem-solving	• diagnosing problems in the allocation and use of business resources • taking action to resolve issues arising when conducting work activities
Initiative and enterprise	• collecting information and market intelligence on expected market growth areas • identifying, evaluating and suggesting marketing opportunities
Planning and organising	• planning and implementing strategies to improve client relationships • planning promotional activities, such as product launches
Self-management	• managing own time to ensure targets are met
Learning	• maintaining knowledge of products and services • participating in ongoing professional development activities
Technology	• using a computer-based program to develop an audio-visual presentation • selecting and using business technology suitable for a task

Packaging Rules

Total number of units = 10

4 core units *plus*

6 elective units

3 of the elective units must be selected from the elective units listed below.

3 elective units may be selected from the elective units listed below, from this Training Package or from any current accredited course or endorsed Training Package at this qualification level. If not listed below, 1 unit may be selected from either a Certificate III or Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

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Core units

BSBCMM401A	Make a presentation
BSBMKG401B	Profile the market
BSBMKG402B	Analyse consumer behaviour for specific markets
BSBMKG408B	Conduct market research

Elective units

Advertising

BSBADV405A	Perform media calculations

Customer service

BSBCUS402B	Address customer needs
BSBCUS403B	Implement customer service standards

E-business

BSBEBU401A	Review and maintain a website

Financial management

BSBFIM501A Manage budgets and financial plans

International business

BSBINT401B Research international business opportunities

IT analysis and design

BSBITA401A Design databases

IT use

BSBITU301A Create and use databases

Marketing

BSBMKG409A	Design direct response offers

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BSBMKG410A	Test direct marketing activities
BSBMKG411A	Analyse direct marketing databases
BSBMKG412A	Conduct e-marketing communications
BSBMKG413A	Promote products and services
BSBMKG414B	Undertake marketing activities
BSBMKG415A	Research international markets
BSBMKG416A	Market goods and services internationally

Occupational health and safety

BSBOHS407A	Monitor a safe workplace

Product skills and advice

BSBPRO401A	Develop product knowledge

Public relations

BSBPUB401A	Develop and apply knowledge of public relations industry
BSBPUB402A	Develop public relations campaigns
BSBPUB403A	Develop public relations documents

Relationship management

BSBREL401A	Establish networks
BSBREL402A	Build client relationships and business networks

Research

BSBRES401A Analyse and present research information

Risk management

BSBRSK401A	Identify risk and apply risk management processes

Sales

BSBSLS407A Identify and plan sales prospects

BSBSLS408A Present, secure and support sales solutions

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Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

Workplace effectiveness

BSBWOR401A Establish effective workplace relationships

Writing

BSBWRT401A Write complex documents

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BSB41407 Certificate IV in Occupational Health and Safety

Modification History

Release	Comments

Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*.
	• Outdated advice removed
	• Unit codes updated:
	  • BSBCUS401A now BSBCUS401B
	  • BSBCUS402A now BSBCUS402B
	  • BSBITS401A now BSBITS401B

Description

Descriptor

This qualification reflects the role of individuals who use well-developed skills and a broad knowledge base in a wide variety of contexts. They apply solutions to a defined range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others with some limited responsibility for the output of others. This qualification would suit an OHS officer in a full-time dedicated role who works under the supervision of an OHS Coordinator or OHS Manager.

Job Roles

- Occupational Health and Safety Coordinator
- Occupational Health and Safety Officer.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

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Pathways into the qualification

Candidates may enter the qualification through a number of entry points including:

- BSB30707 Certificate III in Occupational Health and Safety or other relevant Certificate III qualification

OR

- with extensive vocational experience in occupational health and safety roles.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Health and Safety Representative
- Health and Safety Committee Member
- Health and Safety Assistant.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB51307 Diploma of Occupational Health and Safety.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY
The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• establishing communication with emergency management services and talking with the casualty, bystanders and medical staff in an emergency situation
Teamwork	• establishing return to work programs with rehabilitation providers, relevant managers and the employee • working as part of a group to request occupational health and safety
Problem-solving	• assessing risks to first aiders and others, and determining an appropriate response
Initiative and enterprise	• identifying possible improvements to occupational health and safety, and contributing these to the decision making process
Planning and organising	• planning documents such as occupational health and safety action plans based on the purpose, appropriate format, means of communication and logical presentation of data, information and knowledge
Self-management	• planning work priorities
Learning	• applying learning about occupational health and safety processes to future operations • identifying training needs of people with occupational health and safety responsibilities and providing the training
Technology	• using communication technology, including media and equipment, to talk to emergency management services • using software systems to record and file documentation for hazard identification and risk assessment

Packaging Rules

Total number of units = 9

9 elective units

6 elective units must be selected from the **Group A units** listed below including:

- BSBOHS408A Assist with compliance with OHS and other relevant laws

AND AT LEAST ONE OF:

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- BSBOHS405B Contribute to the implementation of emergency procedures

OR

- BSBOHS406C Use equipment to conduct workplace monitoring

At least **1 elective unit** must be selected from the **Group A** or **Group B** units listed below.

The remaining **2 elective units** may be selected from the **Group A** or **Group B** units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from a Certificate III or Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Elective units

Group A units

BSBOHS401B	Contribute to the implementation of a systematic approach to managing OHS
BSBOHS402B	Contribute to the implementation of the OHS consultation process
BSBOHS403B	Identify hazards and assess OHS risks
BSBOHS404B	Contribute to the implementation of strategies to control OHS risk
BSBOHS405B	Contribute to the implementation of emergency procedures
BSBOHS406C	Use equipment to conduct workplace monitoring
BSBOHS408A	Assist with compliance with OHS and other relevant laws

Group B units

Creative Thinking

BSBCRT501A Originate and develop concepts

Customer Service

BSBCUS401B Coordinate implementation of customer service strategies

BSBCUS402B Address customer needs

Financial Administration

BSBFIA402A Report on financial activity

General Administration

BSBADM409A Coordinate business resources

Innovation

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BSBINN301A Promote innovation in a team environment

Interpersonal Communication

BSBCMM401A Make a presentation

IT Support

BSBITS401B Maintain business technology

Marketing

BSBMKG413A Promote products and services

BSBMKG414B Undertake marketing activities

Occupational Health and Safety

BSBOHS407A Monitor a safe workplace

Project Management

BSBPMG510A Manage projects

Relationship Management

BSBREL401A Establish networks

Research

BSBRES401A Analyse and present research information

Risk Management

BSBRSK401A Identify risk and apply risk management processes

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

Writing

BSBWRT401A Write complex documents

•

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BSB41507 Certificate IV in Project Management

Modification History

Not applicable.

Description

Descriptor

This qualification reflects the role of individuals who use well-developed skills and a broad knowledge base in a wide variety of contexts. They apply solutions to a defined range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others with some limited responsibility for the output of others.

Job Roles

- Project Coordinator
- Project Management Officer
- Project Team Member
- Project or Program Administrator.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB30107 Certificate III in Business or other relevant qualification/s

OR

- with extensive vocational experience in project-based work without a formal project management qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Administrative Officer

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- Customer Service Advisor
- Personal Assistant
- Small Business Assistant
- Student Services Officer.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB51407 Diploma of Project Management.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Qualification Code and Title The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• assisting the project team to plan communications, facilitate information flow and review communications • communicating verbally with external parties/clients; participating in meetings, questioning and discussions, and

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	making presentations
Teamwork	• working with external parties/clients and the project team manager
Problem-solving	• recommending ways to eliminate causes of unsatisfactory performance of products and processes • resolving and preventing conflict within the team
Initiative and enterprise	• generating a range of responses to new and emerging situations • translating ideas into actions and measurable outcomes
Planning and organising	• planning work and project tasks for self and others • tracking actual effort against the project plan
Self-management	• undertaking the work in accordance with an agreed management plan and within delegated authority
Learning	• identifying the learning and development needs of people working on the project and facilitating those needs being met
Technology	• using word processing packages to produce written plans, scope definitions, reports of project activities and communications with stakeholders

Packaging Rules

Packaging Rules	
Total number of units = 8	
8 core units	
Core units	
Project Management	
BSBPMG401A	Apply project scope management techniques
BSBPMG402A	Apply time management techniques
BSBPMG403A	Apply cost management techniques
BSBPMG404A	Apply quality management techniques
BSBPMG405A	Apply human resources management approaches
BSBPMG406A	Apply communications management techniques

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Packaging Rules	
BSBPMG407A	Apply risk management techniques
BSBPMG408A	Apply contract and procurement procedures

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BSB41607 Certificate IV in Purchasing

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed Unit codes updated: • BSBCUS401A now BSBCUS401B • BSBCUS402A now BSBCUS402B • BSBCUS403A now BSBCUS403B

Description

Descriptor

This qualification is designed for individuals with responsibilities for conducting purchasing activities in an organisation. They may work in any industry or organisational setting. They may have whole of procurement life cycle responsibilities or work in specific functions such as contract management or tendering. Typically those completing this qualification would report to a purchasing manager or contract manager.

Job Roles

- Procurement Officer
- Purchasing and Inventory Administrator
- Purchasing Assistant
- Purchasing Clerk
- Purchasing Officer
- Stock Control Officer.
-

Pathways Information

Qualification Pathways

Entry requirements

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There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB30107 Certificate III in Business or other relevant qualification/s

OR

- with vocational experience in assisting purchasing managers or coordinators to conduct purchasing activities but without formal purchasing qualifications.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Accounts Clerk
- Administrative Officer
- Customer Service Advisor
- Personal Assistant
- Small Business Assistant
- Student Services Officer.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB51507 Diploma of Purchasing.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

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Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Qualification Code and Title The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• clarifying service needs with customers • clearly communicating purchasing requirements to prospective suppliers • negotiating with online service providers for the purchase of goods and services
Teamwork	• negotiating and confirming requirements for online trade with suppliers • working with personnel from regulatory authorities to arrange for the importation of goods
Problem-solving	• dealing with irregularities when reconciling organisational and online bill paying and transaction records • diagnosing problems in matching service delivery to customer needs
Initiative and enterprise	• conducting research to identify sources/supplies for required products • developing options for improved services to customers
Planning and organising	• developing project plans including time lines, task breakdown and roles and responsibilities of team members • preparing and promoting specification documentation
Self-management	• behaving ethically when dealing with potential suppliers by following codes of practice for confidentiality and probity • managing time to ensure work is completed on time
Learning	• learning from the review of previous projects • seeking assistance form senior colleagues to overcome difficulties in meeting customer service standards
Technology	• using business technology such as purchasing and word processing software to conduct purchasing activities

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Packaging Rules

Total number of units = 10

3 core units plus

7 elective units

5 elective units must be selected from the elective units listed below.

The remaining **2 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 elective unit** may be selected from either a Certificate III or Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

IT Use

BSBITU305A Conduct online transactions

Purchasing and Contracting

BSBPUR401B Plan purchasing

BSBPUR402B Negotiate contracts

Elective units

Customer Service

BSBCUS401B Coordinate implementation of customer service strategies

BSBCUS402B Address customer needs

BSBCUS403B Implement customer service standards

Financial Administration

BSBFIA402A Report on financial activity

General Administration

BSBADM409A Coordinate business resources

IT Use

BSBITU401A Design and develop complex text documents

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Occupational Health and Safety

BSBOHS407A Monitor a safe workplace

Purchasing and Contracting

BSBPUR403B Conduct international purchasing

Relationship Management

BSBREL401A Establish networks

Research

BSBRES401A Analyse and present research information

Risk Management

BSBRSK401A Identify risk and apply risk management processes

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

Workplace Effectiveness

BSBWOR401A Establish effective workplace relationships

BSBWOR402A Promote team effectiveness

Writing

BSBWRT401A Write complex documents

Imported Units

PSPGOV406B Gather and analyse information

PSPPROC406B Procure goods and services

PSPPROC407A Establish procurement need

PSPPROC408A Develop requests for offers

PSPPROC409A Receive and select offers

PSPPROC410A Administer contracts

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BSB41707 Certificate IV in Recordkeeping

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed Unit codes updated: • BSBCUS401A now BSBCUS401B • BSBCUS402A now BSBCUS402B • BSBITS401A now BSBITS401B • BSBRKG403B now BSBRKG403C

Description

Descriptor

This qualification reflects the role of individuals who apply well-developed recordkeeping skills and a broad knowledge base in a wide variety of contexts. They apply solutions to a defined range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others with some limited responsibility for the output of others.

Job Roles

- Medical Records Officer
- Records and Information Officer
- Records and Information Clerk.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

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Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB30807 Certificate III in Recordkeeping or other relevant qualifications

OR

- after achieving the Recordkeeping Skill Set within this Training Package

OR

- with vocational experience in recordkeeping but without a formal qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Administration Officer
- Assistant Records Clerk
- Assistant Registry Officer.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB51707 Diploma of Recordkeeping.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY

The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating and documenting complex relationships • consulting about and negotiating solutions for information needs • preparing document specifications for managing records • promoting products and services to internal and/or external clients • using a high level of communication and linguistic competence
Teamwork	• consulting and maximising team involvement in developing new systems and processes • delegating responsibilities and networking with others • relating to a diverse range of internal and external clients
Problem-solving	• analysing systems and using design skills as required • generating solutions to workplace information and recordkeeping needs
Initiative and enterprise	• analysing systems and using design skills as required • generating solutions to workplace information and recordkeeping needs
Planning and organising	• accessing, analysing and evaluating information • developing and validating procedures and guidelines • developing contingency plans and budgets • monitoring business performance and setting performance targets
Self-management	• managing time and ensuring compliance with legislation and organisational policies and procedures
Learning	• improving the performance of systems based on feedback • maintaining knowledge of products and services
Technology	• collecting and manipulating data using appropriate technology • ensuring systems are appropriate for information storage, security and retrieval

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Packaging Rules

Total number of units = 10

4 core units plus

6 elective units

2 elective units must be selected from the elective units listed below or from an equivalent level qualification within the BSB07 Business Services Training Package.

The remaining **4 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from either a Certificate III or Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

Recordkeeping

BSBRKG401B	Review the status of a record
BSBRKG402B	Provide information from and about records
BSBRKG403C	Set up a business or records system for a small office
BSBRKG404A	Monitor and maintain records in an online environment

Elective units

Customer Service

BSBCUS401B	Coordinate implementation of customer service strategies
BSBCUS402B	Address customer needs

E-Business

BSBEBU401A	Review and maintain a website

Financial Administration

BSBFIA402A Report on financial activity

General Administration

BSBADM409A	Coordinate business resources

Innovation

BSBINN301A Promote innovation in a team environment

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Interpersonal Communication

BSBCMM401A Make a presentation

IT Support

BSBITS401B Maintain business technology

IT Use

BSBITU401A Design and develop complex text documents

Learning and Development

BSBLED401A Develop teams and individuals

Marketing

BSBMKG413A Promote products and services

BSBMKG414B Undertake marketing activities

Medical Services Administration

BSBMED401B Manage patient record keeping system

Occupational Health and Safety

BSBOHS407A Monitor a safe workplace

Project Management

BSBPMG510A Manage projects

Relationship Management

BSBREL401A Establish networks

Research

BSBRES401A Analyse and present research information

Risk Management

BSBRSK401A Identify risk and apply risk management processes

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

Workplace Effectiveness

BSBWOR402A Promote team effectiveness

Writing

BSBWRT401A Write complex documents

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BSB41807 Certificate IV in Unionism and Industrial Relations

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed Unit codes updated: • BSBCUS401A now BSBCUS401B • BSBCUS402A now BSBCUS402B • BSBITS401A now BSBITS401B

Description

Descriptor

This qualification reflects the role of individuals who use well-developed skills and a broad knowledge base in unionism and industrial relations in a wide variety of contexts. They apply solutions to a defined range of unpredictable problems, and analyse and evaluate information from a variety of sources. They may provide leadership and guidance to others with some limited responsibility for the output of others.

Job Roles

- Union Organiser
- Workplace Union Representative.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

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- BSB30107 Certificate III in Business or other relevant qualification/s

OR

- with vocational experience in assisting workplace union representatives conduct unionism activities but without formal unionism qualifications.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Accounts Clerk
- Administrative Officer
- Clerk
- Customer Service Advisor
- Legal Secretary
- Medical Secretary
- Personal Assistant
- Small Business Assistant
- Student Services Officer.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB51807 Diploma of Unionism and Industrial Relations.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY

The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating effectively with workers to encourage them to join the union, and to become involved in union activities and activism • negotiating with employers and employees during the bargaining process • providing advice to union members consistent with their literacy abilities
Teamwork	• developing networks of people from diverse backgrounds to promote equality of opportunity and fair treatment • working within a team to identify opportunities to empower members
Problem-solving	• predicting opposing arguments in a case before a tribunal and preparing key points to address them • solving workplace issues and problems individually or in teams
Initiative and enterprise	• finding new ways of enabling others to shift their attitudes • presenting a range of options to resolve issues between members and employers • thinking laterally about problems to find new solutions
Planning and organising	• planning and organising contact and discussions with workers to promote unionism • preparing and presenting unfair dismissal cases before a tribunal
Self-management	• being self aware to ensure all members are treated fairly • modelling behaviour that supports the values of unionism and thereby encouraging confidence and belief in unionism as a way of improving workers' lives
Learning	• advising members and representatives on strategies to implement union policies • reflecting on the success of negotiating tactics and strategies when representing a member or members before a tribunal
Technology	• using computers and software to source information from the internet to research information relevant to a case before a tribunal • using office technology to access, record and document information about negotiations or tribunal hearings

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Packaging Rules

Total number of units = 10

3 core units plus

7 elective units

2 elective units must be selected from the **Group A** units listed below.

At least **3 elective units** must be selected from the remaining **Group A** units or the **Group B** units listed below.

The remaining **2 elective units** may be selected from the **Group A** or **Group B** units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from either a Certificate III or Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

Workplace Relations

BSBWRK403A	Communicate with workers
BSBWRK404A	Promote equality of opportunity and fair treatment for all workers
BSBWRK405A	Promote union values, principles and policies

Elective units

Group A units

Workplace Relations

BSBWRK401A	Develop and implement an organising plan
BSBWRK402A	Empower workers
BSBWRK406A	Participate in the bargaining process
BSBWRK407A	Provide advice to union members
BSBWRK408A	Undertake negotiations
BSBWRK409A	Prepare for and participate in dispute resolution

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Group B units

Customer Service

BSBCUS401B Coordinate implementation of customer service strategies

BSBCUS402B Address customer needs

Financial Administration

BSBFIA402A Report on financial activity

General Administration

BSBADM409A Coordinate business resources

Innovation

BSBINN301A Promote innovation in a team environment

Interpersonal Communication

BSBCMM401A Make a presentation

IT Support

BSBITS401B Maintain business technology

IT Use

BSBITU401A Design and develop complex text documents

Learning and Development

BSBLED401A Develop teams and individuals

Marketing

BSBMKG413A Promote products and services

BSBMKG414B Undertake marketing activities

Relationship Management

BSBREL401A Establish networks

Research

BSBRES401A Analyse and present research information

Risk Management

BSBRSK401A Identify risk and apply risk management processes

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

Occupational Health and Safety

BSBOHS407A Monitor a safe workplace

Project Management

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BSBPMG510A Manage projects

Writing

BSBWRT401A Write complex documents

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BSB41910 Certificate IV in Business (Governance)

Modification History

Not applicable.

Description

Descriptor

This qualification reflects the role of individuals who undertake responsibilities required of Aboriginal and Torres Strait Islander organisations, and who bring a wide range of knowledge, skills, talents and experience to their organisations.

Boards of Aboriginal and Torres Strait Islander community-managed organisations operate in two worlds; they have cultural obligations to their community as well as legal and financial obligations to the wider community and funding bodies.

In their special role of leading their organisations, board members would ensure that while fulfilling their duties, they are individually and collectively contributing the best value to the board, organisation and community.

Job roles

Possible job roles relevant to this qualification include:

- board member
- contact officer or secretary
- manager and senior staff member in an Aboriginal and Torres Strait Islander organisation
- public servant working with Aboriginal and Torres Strait Islander boards of governance.
-

Pathways Information

Qualification pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

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- some vocational experience working on or with a board of governance, but with no formal qualifications

OR

- full attendance and participation in introductory Corporate Governance workshops, Indigenous Leadership programs or other relevant non-accredited training

OR

- after achieving BSB30110 Certificate III in Business or other relevant qualifications.

Pathways from the qualification

BSB50710 Diploma of Business (Governance) and a range of other Diploma qualifications.

Licensing/Regulatory Information

Licensing, **legislative**, **regulatory or certification considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, Aboriginal and Torres Strait organisations operate in a variety of environments and some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating in culturally appropriate ways • discussing information, questioning outcomes and actions, sharing ideas, and clarifying information with staff and other board members • networking and negotiating with members of the community • providing information to the community about the organisation's

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	activities and board decisions
Teamwork	• encouraging a team approach where individual contributions are recognised and acknowledged • identifying people and delegating authority to relevant team members • making decisions in the best interests of the organisation and the community • seeking stakeholder participation in decision making
Problem-solving	• analysing and evaluating information • ensuring activities follow the constitution and organisational policies and procedures • questioning outcomes and actions of financial reports • reviewing effectiveness and efficiency of decisions and direction of the organisation
Initiative and enterprise	• reviewing the board and board members • seeking funding for new activities • adding value to, and building positive reputation of, the organisation
Planning and organising	• developing organisational plans • planning and organising annual meetings, general meetings and board meetings • planning regular community forums • setting directions for the future of the organisation
Self-management	• adhering to the operational structure of the board and performing responsibilities as per the role description • fulfilling duties and legal responsibilities • modelling respect for community culture and values
Learning	• promoting an environment that encourages people to enhance their skills and knowledge • seeking advice from cultural and technical advisers • sharing skills with others

Technology	• using technology:
	  • for communication, time scheduling and planning
	  • to gather information

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Packaging Rules

Packaging Rules

Total number of units = 12

7 core units plus

5 elective units

Three elective units must be selected from the elective units listed below.

Two units may be selected from the elective units listed below, from elsewhere in this Training Package, or from any other currently endorsed Training Package or accredited course at this qualification level, or Certificate III or Diploma level.

Elective units must be relevant to the work outcome, local industry and/or community requirements and the qualification level.

Core units

BSBATSIC412A Maintain and protect cultural values in the organisation

BSBATSIL411A Undertake the roles and responsibilities of a board member

BSBATSIL413A Review and apply the constitution

BSBATSIM416A Oversee organisational planning

BSBATSIM417A Implement organisational plans

BSBATSIM418A Oversee financial management

BSBATSIM419A Contribute to the development and implementation of organisational policies

Elective units

ATSI governance

BSBATSIC411C Communicate with the community

BSBATSIL408C Manage a board meeting

BSBATSIL412A Participate effectively as a board member

BSBATSIM414C Oversee the organisation's annual budget

BSBATSIM420A Oversee asset management

BSBATSIM421A Support a positive and culturally appropriate workplace culture

BSBATSIW416C Obtain and manage consultancy services

BSBATSIW417C Select and use technology

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Research

BSBRES401A Analyse and present research information

Sustainability

BSBSUS301A Implement and monitor environmentally sustainable work practices

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BSB50107 Diploma of Advertising

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. • BSBSUS501A included as elective unit • unit code suffixes updated

Description

Descriptor

This qualification reflects the role of individuals who possess a sound theoretical knowledge base in advertising management and demonstrate a range of managerial skills to ensure that advertising functions are effectively conducted in an organisation or business area. Typically they would have responsibility for the work of other staff and lead teams in conducting advertising campaigns.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- account manager
- advertising account manager
- advertising creative director
- advertising manager
- copywriter
- account planner.
-

Pathways Information

Qualification pathways

Entry requirements

There are no entry requirements for this qualification.

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Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB40107 Certificate IV in Advertising or other relevant qualification

or

- with vocational experience working in advertising in a team leader, supervisory or management role, seeking to consolidate skills and knowledge in managing the advertising function in an agency or organisation but without a formal advertising qualification.

Pathways from the qualification

- BSB60110 Advanced Diploma of Advertising or a range of Advanced Diploma qualifications
-

Licensing/Regulatory Information

Licensing, **legislative**, **regulatory or certification considerations**

There is no direct link between this qualification and licensing, legislative or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability skill	**Industry or enterprise requirements for this qualification include**:
Communication	• communicating a client's product, service or idea effectively to the customer • using a range of writing skills to write clear, creative briefs and persuasive copy

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Teamwork	• managing a range of personnel, consulting work teams and professional networks • receiving and giving feedback, and providing coaching and mentoring in job role
Problem-solving	• solving workplace issues and problems individually or in teams • taking action to resolve client concerns
Initiative and enterprise	• applying visual and design skills • being creative and providing innovative solutions to complex issues • developing innovative approaches to conveying marketing communications for client's product, service or idea
Planning and organising	• collecting, collating and analysing information using appropriate workplace business systems • developing schedules and setting priorities
Self-management	• establishing personal work goals and developing a personal work plan • managing own time and priorities and dealing with contingencies • taking responsibility as required by job role and ensuring organisational policies and procedures are adhered to
Learning	• developing and maintaining professional competence • developing personal learning and development pathway • maintaining knowledge of products and services
Technology	• using computerised systems, software and telecommunication devices to generate creative advertisements • using technology to assist the management of information and to assist the planning process • using technology to record and generate ideas

Packaging Rules

Total number of units = 8

8 elective units

5 elective units must be selected from the Group A elective units below.

At least **2 elective units** must be selected from either the remaining Group A or Group

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B units listed below, or from an equivalent level qualification in BSB07 Business Services Training Package.

The remaining **elective unit** may be selected from the units listed below, from this Training Package or from any current accredited course or endorsed Training Package at this qualification level or Certificate IV or Advanced Diploma level.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Elective units

Group A

Advertising

BSBADV503B	Coordinate advertising research
BSBADV507B	Develop a media plan
BSBADV509A	Create mass print media advertisements
BSBADV510A	Create mass electronic media advertisements
BSBMKG523A	Design and develop an integrated marketing communication plan

Creative thinking

BSBCRT501A	Originate and develop concepts

Financial management

BSBFIM501A	Manage budgets and financial plans

Interpersonal communication

BSBCMM401A	Make a presentation

Writing

BSBWRT501A	Write persuasive copy

Group B

Advertising

BSBADV602B	Develop an advertising campaign
BSBADV603B	Manage advertising production
BSBADV604B	Execute an advertising campaign
BSBADV605B	Evaluate campaign effectiveness

Customer service

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BSBCUS501C	Manage quality customer service
Design process	
BSBDES601A	Manage design realisation
BSBDES602A	Research global design trends
Information management	
BSBINM501A	Manage an information or knowledge management system
Learning and development	
BSBLED501A	Develop a workplace learning environment
Management	
BSBMGT502B	Manage people performance
BSBMGT515A	Manage operational plan
BSBMGT516C	Facilitate continuous improvement
Marketing	
BSBMKG402B	Analyse consumer behaviour for specific markets
BSBMKG501B	Identify and evaluate marketing opportunities
BSBMKG502B	Establish and adjust the marketing mix
BSBMKG506B	Plan market research
BSBMKG507A	Interpret market trends and developments
BSBMKG508A	Plan direct marketing activities
BSBMKG509A	Implement and monitor direct marketing activities
BSBMKG510B	Plan e-marketing communications
BSBMKG514A	Implement and monitor marketing activities
BSBMKG515A	Conduct a marketing audit
BSBMKG520A	Manage compliance within the marketing legislative framework
BSBMKG522A	Plan measurement of marketing effectiveness
Occupational health and safety	
BSBOHS509A	Ensure a safe workplace
Public relations	
BSBPUB501A	Manage the public relations publication process
BSBPUB502A	Develop and manage complex public relations campaigns
BSBPUB503A	Manage fundraising and sponsorship activities
BSBPUB504A	Develop and implement crisis management plans
Project management	

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BSBPMG510A Manage projects

Relationship management

BSBREL501A Build international client relationships

BSBREL502A Build international business networks

Risk management

BSBRSK501B Manage risk

Sustainability

BSBSUS501A Develop workplace policy and procedures for sustainability

Workplace effectiveness

BSBWOR501B Manage personal work priorities and professional development

BSBWOR502B Ensure team effectiveness

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BSB50110 Diploma of Legal Services

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Correction to Employability Skills summary ie code and title of qualification included.

Description

Descriptor

This qualification reflects the role of individuals who possess a sound theoretical knowledge base and use a range of specialised, technical or managerial competencies to plan and carry out work in a legal context in accordance with legislation, regulations and codes of practice relevant to the different jurisdictions.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- executive assistant
- legal services support officer
- paralegal
- senior legal secretary.
-

Pathways Information

Qualification pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

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- after achieving BSB40110 Certificate lV in Legal Services or other relevant qualifications in addition to competency in BSBITU307A Develop keyboarding speed and accuracy

OR

- providing evidence of the completion of all units of competency required for BSB40110 Certificate IV in Legal Services as well as evidence of competency in BSBITU307A Develop keyboarding speed and accuracy

OR

- with vocational experience in a range of settings without a formal business qualification.

Pathways from the qualification

After achieving BSB50110 Diploma of Legal Services, candidates may undertake a range of advanced diploma qualifications.

Licensing/Regulatory Information

Licensing, **legislative**, **regulatory or certification considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
BSB50110 Diploma of Legal Services The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability skill	**Industry/enterprise requirements for this qualification include**:
Communication	• attending court and presenting information • communicating outcomes to clients in a clear and simple manner • communicating with internal and external clients in formal meetings requiring excellent interviewing, presentation and

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	negotiating skills • creating complex reports from research and analysis of a wide range of information
Teamwork	• identifying and utilising team member strengths • mentoring as required • working closely with legal practitioners and others to research, collect, collate and present information
Problem-solving	• applying financial skills for costing complex files, invoicing and maintaining trust accounts • interpreting court rulings • using discretion and judgement while working within codes of conduct • working under supervision to resolve issues with clients and responding to changing situations
Initiative and enterprise	• being creative and providing innovative solutions to complex issues • responding to new and changing circumstances to ensure accurate and timely advice
Planning and organising	• arranging meetings and allocating resources to ensure organisational requirements are met • collecting, collating and analysing information using appropriate workplace systems • planning for contingencies and strategising to meet client needs • preparing detailed documentation
Self-management	• keeping paperwork up-to-date and organising information according to organisational and legal requirements • managing own time and priorities and dealing with contingencies • understanding limits of own responsibility
Learning	• mentoring others to develop skills and knowledge required in a legal practice • responding positively to learning opportunities and managing own education

Technology	• selecting and using:
	  • business technology, such as email, websites, voice mail, audio cassettes, computers and software
	  • online services to communicate, research and report

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Packaging Rules

Total number of units = 10

4 core units *plus*

6 elective units

4 elective units must be selected from the elective units listed below.

The remaining **2 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below **1 elective unit** may be selected from either a Certificate IV or Advanced Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

BSBCOM501B Identify and interpret compliance requirements

BSBCMM501A Develop and nurture relationships

BSBLED503A Maintain and enhance professional practice

BSBRES502A Research legal information using secondary sources

Elective units

BSBLEG510A Apply legal principles in family law matters

BSBLEG511A Apply legal principles in criminal law matters

BSBLEG512A Apply legal principles in property law matters

BSBLEG513A Apply legal principles in corporation law matters

BSBLEG514A Assist with civil procedure

BSBLEG515A Apply legal principles in wills and probate matters

BSBSUS301A Implement and monitor environmentally sustainable work practices

BSBSUS501A Develop workplace policy and procedures for sustainability

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BSB50207 Diploma of Business

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Unit codes updated: • BSBCON601A now BSBCON601B • BSBRSK501A now BSBRSK501B • BSBWOR501A now BSBWOR501B

Description

Descriptor

This qualification reflects the role of individuals with substantial experience in a range of settings who are seeking to further develop their skills across a wide range of business functions. This qualification is also suited to the needs of individuals with little or no vocational experience, but who possess sound theoretical business skills and knowledge that they would like to develop in order to create further educational and employment opportunities.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- executive officer
- program consultant
- program coordinator.
-

Pathways Information

Qualification pathways

Entry requirements

There are no entry requirements for this qualification.

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Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB40207 Certificate IV in Business or other relevant qualification

or

- with vocational experience in a range of work environments in senior support roles but without a qualification.

Pathways from the qualification

- BSB60207 Advanced Diploma of Business or a range of other Advanced Diploma qualifications
-

Licensing/Regulatory Information

Licensing, legislative, regulatory or certification considerations

There is no direct link between this qualification and licensing, legislative or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
BSB50207 Diploma of Business The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability skill	**Industry or enterprise requirements for this qualification include**:
Communication	• conducting research to collect and analyse information in a range of reports • consulting with others to develop a range of plans and reports • liaising with stakeholders and promoting participative

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	workplace arrangements
Teamwork	• contributing to the development of other team members • providing feedback on team performance to colleagues and managers
Problem-solving	• applying risk management processes to business operations • assessing financial viability of new opportunities and matching organisational capability with market needs • negotiating solutions to new and emerging issues
Initiative and enterprise	• encouraging creative and innovative workplace solutions • identifying new and emerging opportunities for the business and developing strategies to capitalise on them • managing, fostering and facilitating change
Planning and organising	• developing systems that are flexible and responsive to changing circumstances • planning for contingencies and performance of staff and systems
Self-management	• dealing with contingencies • managing own time and priorities • taking responsibility as required by job role and ensuring organisational policies and procedures are adhered to
Learning	• assisting others to acquire new knowledge and skills to improve team and individual performance
Technology	• using electronic communication devices and processes, such as internet, intranet and email to produce written correspondence and reports • using technology to assist the management of information and to assist the planning process

Packaging Rules

Total number of units = 8

8 elective units

6 of the elective units must be selected from the units listed below. No more than 3 units may be selected from any one group.

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2 elective units may be selected from elective units listed below, from this Training Package or from any current accredited course or endorsed Training Package at this qualification level or Certificate IV or Advanced Diploma level.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Group A

Advertising

BSBADV503B	Coordinate advertising research
BSBADV507B	Develop a media plan
BSBADV509A	Create mass print media advertisements
BSBADV510A	Create mass electronic media advertisements
BSBMKG523A	Design and develop an integrated marketing communication plan

Writing

BSBWRT501A	Write persuasive copy

Group B

E-business

BSBEBU501A	Investigate and design e-business solutions

Financial administration

BSBFIM502A	Manage payroll

General administration

BSBADM502B	Manage meetings
BSBADM503B	Plan and manage conferences
BSBADM504B	Plan or review administrative systems
BSBADM506B	Manage business document design and development

IT building and implementation

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BSBITB501A Establish and maintain a workgroup computer network

Group C

Human resource management

BSBHRM501A	Manage human resources services
BSBHRM502A	Manage human resources management information systems
BSBHRM504A	Manage workforce planning
BSBHRM505B	Manage remuneration and employee benefits
BSBHRM506A	Manage recruitment, selection and induction processes
BSBHRM507A	Manage separation or termination
BSBHRM509A	Manage rehabilitation or return-to-work programs
BSBHRM510A	Manage mediation processes

Learning and development

BSBLED502A	Manage programs that promote personal effectiveness

Group D

Marketing

BSBMKG501B	Identify and evaluate marketing opportunities
BSBMKG502B	Establish and adjust the marketing mix
BSBMKG506B	Plan market research
BSBMKG507A	Interpret market trends and developments
BSBMKG508A	Plan direct marketing activities
BSBMKG509A	Implement and monitor direct marketing activities
BSBMKG510B	Plan e-marketing communications
BSBMKG514A	Implement and monitor marketing activities
BSBMKG515A	Conduct a marketing audit

Public relations

BSBPUB501A	Manage the public relations publication process
BSBPUB502A	Develop and manage complex public relations campaigns
BSBPUB503A	Manage fundraising and sponsorship activities
BSBPUB504A	Develop and implement crisis management plans

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Group E

Continuity

BSBCON601B Develop and maintain business continuity plans

Information management

BSBINM501A Manage an information or knowledge management system

Innovation

BSBINN501A Establish systems that support innovation

BSBINN502A Build and sustain an innovative work environment

Intellectual property

BSBIPR501A Manage intellectual property to protect and grow business

Management

BSBMGT403A Implement continuous improvement

Project management

BSBPMG510A Manage projects

Risk management

BSBRSK501B Manage risk

Sustainability

BSBSUS501A Develop workplace policy and procedures for sustainability

Workplace effectiveness

BSBWOR501B Manage personal work priorities and professional development

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BSB50311 Diploma of Customer Contact

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* *Replaces* BSB50307 Diploma of Customer Contact

Description

This qualification reflects the role of individuals who typically manage complex multi-channel customer interactions, including tending to the training needs of others and promoting continuous process improvements, often in the capacity of a manager and with full authority to delegate.

Duties at this level may include all or some of the following functions: developing policy; making decisions and applying targets, such as KPIs; developing or contributing to organisational strategy; building capability and capacity within an organisation; coaching staff and handling complaints; scheduling and organising; interrogating systems; and building data capture processes.

Candidates undertaking this qualification require sound relationship management skills.

They may provide technical advice and support to a team.

Job roles

Possible job roles relevant to this qualification include:

- contact centre manager
- customer contact segment manager
- quality assurance officer
- customer contact coach
- analyst
- scheduler
- complex enquiry customer contact manager.

Pathways Information

Pathways into the qualification

Preferred pathway for candidates considering this qualification include:

- BSB40311 Certificate IV in Customer Contact or other relevant qualifications

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- vocational experience assisting in a range of support roles without a formal business qualification.

Pathways from the qualification

BSB60407 Advanced Diploma of Management or a range of other Advanced Diploma qualifications.

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability skill	Industry/enterprise requirements for this qualification include:
Communication	• transferring information centre's operational plans, goals, new products and services to team and project members • reading and interpreting a range of reports and information • writing team and project plans, documents and reports
Teamwork	• developing a team culture and identity • managing a team and applying knowledge of one’s own role to achieve team goals • working with diverse persons and groups
Problem-solving	• analysing information and reports • dealing with complex customer complaints and escalations • working through alternatives and improvements
Initiative and enterprise	• contributing to suggestions for improvements to products, services and processes • supporting operational plans and organisational goals
Planning and organising	• developing team plans • managing learning and development plans for team members • planning team resources, targets and performance levels

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Employability skill	Industry/enterprise requirements for this qualification include:
Self-management	• managing own performance and motivating others • managing own time and work priorities • managing stress in the workplace
Learning	• learning new ideas, skills and techniques • providing appropriate information on systems, products and services to team members
Technology	• using electronic communication devices and processes to support team management, i.e. internet, intranet, telephony equipment, software packages, enterprise systems and email • using technology to assist the manipulation of information and to maximise performance

Packaging Rules

Total number of units = 10

3 core units *plus*

7 elective units of which:

- 2 units must be from Group A elective units below
- the remaining 5 units may be from Group A or Group B elective units, or from qualifications at the same level or one higher in any endorsed Training Package or accredited course
- up to 2 units may be from a Certificate IV level qualification.

Elective units must be relevant to the work environment and the qualification, maintain the integrity of the AQF alignment and contribute to a valid, industry-supported vocational outcome.

Core units

BSBCCO504A Integrate customer contact operations in the organisation

BSBLED501A Develop a workplace learning environment

BSBMGT516C Facilitate continuous improvement

Elective units

Group A

BSBAUD501B Initiate a quality audit

BSBCCO501B Develop business continuity strategy

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BSBCCO502A Establish a multicentre

BSBCCO503A Manage data interrogation

BSBCCO601B Optimise customer contact operations

BSBCCO602B Manage customer contact information

BSBCCO603B Design and launch new customer contact facilities

BSBCCO604B Develop and maintain a service level strategy

BSBCCO605B Develop and maintain a customer contact marketing strategy

BSBCCO606B Forecast and plan using customer contact traffic information analysis

BSBCCO607B Manage customer contact centre staffing

BSBCCO608B Manage customer contact operational costs

BSBCUS501C Manage quality customer service

BSBSLS501A Develop a sales plan

BSBSLS502A Lead and manage a sales team

Group B

BSBCCO403A Schedule customer contact activity

BSBCCO407A Administer customer contact technology

BSBCOM501B Identify and interpret compliance requirements

BSBCOM502B Evaluate and review compliance

BSBCOM503B Develop processes for the management of breaches in compliance requirements

BSBCOM601B Research compliance requirements and issues

BSBCOM602B Develop and create compliance requirements

BSBCOM603C Plan and establish compliance management systems

BSBDIV601A Develop and implement diversity policy

BSBHRM402A Recruit, select and induct staff

BSBHRM503B Manage performance management systems

BSBHRM604A Manage employee relations

BSBINM501A Manage an information or knowledge management system

BSBINN502A Build and sustain an innovative work environment

BSBITA601A Configure and optimise customer contact technology

BSBLED502A Manage programs that promote personal effectiveness

BSBLED701A Lead personal and strategic transformation

BSBMGT605B Provide leadership across the organisation

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BSBMGT615A Contribute to organisation development

BSBMGT618A Develop a contact centre business plan

BSBMKG610A Develop, implement and monitor a marketing campaign

BSBOHS509A Ensure a safe workplace

BSBPUB504A Develop and implement crisis management plans

BSBRSK501B Manage risk

BSBSUS501A Develop workplace policy and procedures for sustainability

BSBWOR403A Manage stress in the workplace

BSBWOR502B Ensure team effectiveness

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BSB50407 Diploma of Business Administration

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07 Business Services Training Package.* Unit codes updated: • BSBCUS501C now BSBCUS501C

Description

Descriptor

This qualification reflects the role of individuals who possess a sound theoretical knowledge base and use a range of specialised, technical or managerial competencies to plan, carry out and evaluate their own work and/or the work of a team.

Job Roles

- Administration Manager
- General Office Manager
- Office Manager.
-

Pathways Information

Qualification Pathways

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB40507 Certificate IV in Business Administration or other relevant qualification/s

OR

- extensive vocational experience in a range of environments in senior support roles.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

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- Administration Officer
- Accounts Supervisor
- Executive Personal Assistant
- Office Administrator
- Project Assistant.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake a variety of business studies at the advanced diploma level.

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Qualification Code and Title The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• managing organisational systems and processes to ensure usability and compliance by all staff • participating in complex interpersonal exchanges requiring excellent negotiation and writing skills

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	• using effective interpersonal skills and relating to a wide range of internal and external clients
Teamwork	• delegating tasks as per job role responsibilities to appropriately skilled team members • working and consulting with others to develop systems and processes
Problem-solving	• anticipating problems and preparing contingency plans • controlling budgets, reconciling figures, rectifying anomalies and applying estimating skills • researching and analysing data to prepare work plans and processes as required
Initiative and enterprise	• being creative and providing innovative solutions to complex issues • choosing appropriate systems to meet organisational needs • designing and developing documentation and related processes • responding to new and changing circumstances to ensure accurate and timely advice
Planning and organising	• allocating resources to ensure organisational requirements are met • collecting, collating and analysing information using appropriate workplace business systems • developing contingency plans and strategising to meet client needs • managing meetings and conferences effectively through excellent time management and organisational skills
Self-management	• following legislative and regulatory requirements to ensure the safety and security of organisational and employee information • managing own time and priorities and dealing with contingencies • meeting statutory requirements in respect to payroll and recruitment practices • taking responsibility as required by work role and ensuring all organisational polices and procedures are followed
Learning	• planning training needs, and monitoring and evaluating training and induction programmes
Technology	• using complex functions of computer software to design and develop templates, standard documentation and user manuals • using electronic communication devices and processes i.e. computers, internet, intranet, email to produce written correspondence and reports • using technology to manage organisational information

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Packaging Rules

Total number of units = 8

8 elective units

5 elective units must be selected from the **Group A** units listed below.

The remaining **3 elective units** may be selected from the **Group B** units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from either a Certificate IV or Advanced Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Elective units

Group A units

Financial Management

BSBFIM502A Manage payroll

General Administration

BSBADM502B Manage meetings

BSBADM503B Plan and manage conferences

BSBADM504B Plan or review administration systems

BSBADM506B Manage business document design and development

IT Building and Implementation

BSBITB501A Establish and maintain a workgroup computer network

Project Management

BSBPMG510A Manage projects

Group B units

Customer Service

BSBCUS501C Manage quality customer service

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Information Management

BSBINM501A Manage an information or knowledge management system

Innovation

BSBINN301A Promote innovation in a team environment

Management

BSBMGT502B Manage people performance

Recordkeeping

BSBRKG502B Manage and monitor business or records systems

Sustainability

BSBSUS501A Develop workplace policy and procedures for sustainability

Workplace Effectiveness

BSBWOR501B Manage personal work priorities and professional development

BSBWOR502B Ensure team effectiveness

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BSB50507 Diploma of Franchising

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed

Description

Descriptor

This qualification reflects the role of individuals who act as franchisors. A franchisor licenses trademarks, and tried and proven methods of doing business to a franchisee in exchange for a recurring payment, and usually a percentage piece of gross sales or gross profits as well as the annual fees. This qualification applies to the franchisor, while the BSB40707 Certificate IV in Franchising applies to the franchisee.

Job Roles

- Franchisor - of one or more sites of a franchise operation within any sector of the economy.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB40407 Certificate IV in Small Business Management, the BSB40707 Certificate IV in Franchising or other relevant qualification/s

OR

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- with vocational experience working in a business management role or a franchising environment, but without formal qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Small Business Manager
- Franchisee.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB60407 Advanced Diploma of Management.

The BSB50507 Diploma of Franchising has been developed for a franchisor. The Certificate IV qualification is designed for those operating as franchisees.

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY
The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• consulting with others on developing a range of operational plans • demonstrating effective interpersonal and customer service skills when interacting with franchisees and customers • reporting on information gained and analysis on possible franchise site opening
Teamwork	• managing relationships and providing feedback • providing coaching and/or counselling skills as required • working closely with and supporting franchisees
Problem-solving	• analysing data and evaluating the effectiveness of systems • calculating resource requirements and acquiring them • conducting financial feasibilities and managing budgets • solving complex and non-routine difficulties • using a variety of problem solving and decision making strategies
Initiative and enterprise	• being entrepreneurial, creative and providing innovative solutions to complex issues • encouraging creative and innovative workplace solutions • identifying new and emerging opportunities for the franchise business and developing strategies to capitalise on them
Planning and organising	• collecting, collating and analysing information using appropriate workplace business systems • planning for business and marketing • researching the feasibility of establishing, planning the set up and implementing policies and procedures for the selected franchise model
Self-management	• applying knowledge in a self directed manner • managing a franchise business model
Learning	• coaching and mentoring others to acquire new knowledge and skills • identifying training opportunities and making training available • managing the performance of franchisees via regular monitoring and review
Technology	• using computerised systems, software and telecommunication devices • using technology to assist the management of information and to assist the planning process • using technology to record and generate ideas

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Packaging Rules

Total number of units = 8

8 elective units

4 elective units must be selected from the **Group A** units listed below.

2 of the **elective units** must be selected from the **Group A** or **Group B** units listed below.

The remaining **2 elective units** may be selected from the **Group B** units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, one unit may be selected from either a Certificate IV or an Advanced Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Group A units

Franchising

BSBFRA501B	Establish a franchise operation
BSBFRA502B	Manage a franchise operation
BSBFRA503B	Manage establishment of new sites or regions
BSBFRA504B	Manage relationships with franchisees
BSBFRA505B	Manage closure of a franchise

Group B units

Customer Service

BSBCUS501C	Manage quality customer service

Financial Management

BSBFIM501A	Manage budgets and financial plans

Information Management

BSBINM501A	Manage an information or knowledge management system

Intellectual Property

BSBIPR501A	Manage intellectual property to protect and grow business

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Learning and Development

BSBLED501A Develop a workplace learning environment

Management

BSBMGT502B Manage people performance

BSBMGT515A Manage operational plan

BSBMGT516C Facilitate continuous improvement

Occupational Health and Safety

BSBOHS509A Ensure a safe workplace

Project Management

BSBPMG510A Manage projects

Risk Management

BSBRSK501B Manage risk

Sustainability

BSBSUS501A Develop workplace policy and procedures for sustainability

Workplace Effectiveness

BSBWOR501B Manage personal work priorities and professional development

BSBWOR502B Ensure team effectiveness

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BSB50607 Diploma of Human Resources Management

Modification History

Not applicable.

Description

Descriptor

This qualification reflects the role of individuals who possess a sound theoretical knowledge base in human resources management and demonstrate a range of managerial skills to ensure that human resources functions are effectively conducted in an organisation or business area. Typically they would have responsibility for the work of other staff.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- human resources adviser
- human resources and change manager
- human resources consultant
- human resources manager
- senior human resources officer.
-

Pathways Information

Qualification pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB41007 Certificate IV in Human Resources or other relevant qualification

or

- with vocational experience in human resources management, but without formal qualifications.

Pathways from the qualification

- BSB60407 Advanced Diploma of Management or other Advanced Diploma qualifications

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Licensing/Regulatory Information

Licensing, **legislative**, **regulatory or certification considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
BSB50607 Diploma of Human Resources Management The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability skill	**Industry or enterprise requirements for this qualification include**:
Communication	• consulting with internal and external stakeholders • interviewing, counselling, negotiating and acting as an advocate for the organisation • questioning to clarify and evaluate information • writing in a range of styles to suit different audiences
Teamwork	• treating team members with integrity, respect and empathy • working with others and clearly identifying the roles and responsibilities of the human resources team, line managers and external contractors
Problem-solving	• conducting cost-benefit analyses, determining salary packaging, and assessing and managing risk • generating a range of options to resolve human resources issues • identifying appropriate data-gathering techniques for training needs analyses • managing organisational change and diversity

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Initiative and enterprise	• being responsive to change and translating ideas into innovative solutions • promoting flexible work practices and encouraging diversity
Planning and organising	• analysing strategic and operational plans in order to plan, deliver and evaluate the human resources service delivery or agreement • collecting, collating and analysing information using appropriate workplace business systems
Self-management	• complying with all legislative and statutory requirements • planning own work, predicting consequences and identifying improvements • presenting a professional image when representing the organisation
Learning	• designing training programs to meet staff or external client requirements • identifying and providing training support • mentoring and coaching others
Technology	• selecting and using technology to record, track and retrieve information • selecting appropriate human resources systems • using electronic communication devices and processes, such as internet, intranet and email to produce written correspondence and reports • using technology to facilitate change, to assist the management of information and to assist the planning process

Packaging Rules

Packaging Rules

Total number of units = 8

3 core units *plus*

5 elective units

3 of the elective units must be selected from the elective units listed below.

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2 elective units may be selected from elective units listed below, from this Training Package or from any current accredited course or endorsed Training Package at this qualification level. **1 elective unit** may be selected from either a Certificate IV or Advanced Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

BSBHRM501A	Manage human resources services
BSBHRM503B	Manage performance management systems
BSBHRM504A	Manage workforce planning

Elective units

Diversity

BSBDIV501A	Manage diversity in the workplace

Human resource management

BSBHRM502A	Manage human resources management information systems
BSBHRM505B	Manage remuneration and employee benefits
BSBHRM506A	Manage recruitment, selection and induction processes
BSBHRM507A	Manage separation or termination
BSBHRM509A	Manage rehabilitation or return-to-work programs
BSBHRM510A	Manage mediation processes

Learning and development

BSBLED502A	Manage programs that promote personal effectiveness

Management

BSBHRM511A	Manage expatriate staff

Sustainability

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BSBSUS501A	Develop workplace policy and procedures for sustainability
Workplace relations	
BSBWRK509A	Manage industrial relations

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BSB50710 Diploma of Business (Governance)

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Wording in packaging rules changed ie three to 3 and two to 2.

Description

Descriptor

This qualification reflects the role of individuals who contribute their skills and knowledge to leading, monitoring and guiding the activities of Aboriginal and Torres Strait Islander organisations, and who bring a wide range of knowledge, skills, talents and experience to their organisations. They provide leadership and guidance to others and have responsibility for the output of others.

Boards of Aboriginal and Torres Strait Islander community-managed organisations operate in two worlds; they have cultural obligations to their community as well as legal and financial obligations to the wider community and funding bodies.

In their special role of leading their organisations, board members would ensure that while fulfilling their duties, they are individually and collectively contributing the best value to the board, organisation and community.

Job roles

Possible job roles relevant to this qualification include:

- board chairperson
- board member
- manager or senior staff member in an Aboriginal and Torres Strait Islander organisation
- senior public servant working with Aboriginal and Torres Strait Islander boards of governance.
-

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Pathways Information

Qualification pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB41910 Certificate IV in Business (Governance) or other relevant qualifications

OR

- extensive vocational experience as a member of a board of governance of an Aboriginal and Torres Strait Islander organisation, but with no formal qualifications.

Pathways from the qualification

A range of other Diploma and Advanced Diploma qualifications.

Licensing/Regulatory Information

Licensing, legislative, regulatory or certification considerations

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, Aboriginal and Torres Strait organisations operate in a variety of environments and some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY
The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Employability skill	**Industry/enterprise requirements for this qualification include**:
Communication	• communicating in a range of styles to suit different audiences • facilitating community participation and control in decision making • negotiating purpose of meetings and contracts using culturally appropriate strategies • representing board and network effectively
Teamwork	• delegating tasks • mentoring and motivating others • working with a wide range of people, including Elders, traditional owners, community members, government workers, managers, staff and board members
Problem-solving	• budgeting and evaluating costs to measure financial position • managing conflict, identifying options for resolving disputes and making decisions that reflect the wellbeing of the community
Initiative and enterprise	• applying a range of options in response to workplace matters • responding to new and changing circumstances to ensure the sustainability of the organisation • translating agreed decisions into creative outcomes
Planning and organising	• leading the strategic planning cycle • managing a number of tasks and coping with irregularities and breakdowns in routine • researching information and disseminating it throughout the community
Self-management	• applying knowledge in a self-directed manner • complying with legislation and statutory requirements as a board member • planning own work, predicting consequences and identifying improvements
Learning	• identifying skills gaps and providing training opportunities as required • inducting and mentoring new staff • managing the performance of team members

Technology	• using technology:
	  • for creating, storing and distributing information
	  • when representing the organisation
	  • to gather information
	  • to assist the management of information and financial records, and the planning process

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Packaging Rules

Total number of units = 12

7 core units plus

5 elective units

3 elective units must be selected from the elective units listed below.

2 units may be selected from the elective units listed below, from elsewhere in this Training Package, or from any other currently endorsed Training Package or accredited course at this qualification level, or Certificate IV or Advanced Diploma level.

Elective units must be relevant to the work outcome, local industry and/or community requirements, and the qualification level.

Core units

BSBATSIC412A Maintain and protect cultural values in the organisation

BSBATSIL411A Undertake the roles and responsibilities of a board member

BSBATSIL510A Appoint and work with a manager

BSBATSIL511A Lead the organisation's strategic planning cycle

BSBATSIL503C Manage conflict

BSBATSIM505C Control organisational finances

BSBATSIM506C Develop employment policies

Elective units

ATSI Governance

BSBATSIC511A Plan and conduct a community meeting

BSBATSIL512A Be a leader in the community

BSBATSIM511C Develop enterprise opportunities

BSBATSIM514A Recruit and induct staff

BSBATSIW514C Represent your organisation

BSBATSIW515C Secure funding

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Sustainability

BSBSUS501A Develop workplace policy and procedures for sustainability

Other

PSPGOV507A Undertake negotiations

NOTE 1: If candidate is selecting the unit PSPGOV507A Undertake negotiations, registered training organisations should contextualise it to include situations relevant to negotiations undertaken by board members of Aboriginal and Torres Strait Islander organisations. Suggestions for contextualisation include broadening the range statement and evidence guide to include the following:

- range statement - stakeholders may include:
  - board members
  - Elders
  - traditional owners
  - community members
- evidence guide - resources required:
  - case studies and workplace, *organisational or community* scenarios
- evidence guide - where and how to assess evidence:
  - a workplace or *organisational* environment or one that closely resembles normal work *or organisational* practice...etc.
  - assessment methods should reflect workplace or *organisational demands*...etc.
  - assessment methods suitable for valid and reliable assessment of this unit of competency may include authenticated evidence from the workplace, *organisation*, *community* and/or training courses.

NOTE 2: This qualification is copyright to the Office of the Registrar of Indigenous Corporations.

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BSB50807 Diploma of International Business

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. BSBWOR501A updated to BSBWOR501B

Description

Descriptor

This qualification reflects the role of individuals who possess a sound theoretical knowledge base in international business management and demonstrate a range of managerial skills to ensure that international business activities are conducted effectively in an organisation or business area. Typically they would have responsibility for the work of other staff and lead teams in conducting international business activities.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- export manager
- import manager
- trade manager.
-

Pathways Information

Qualification pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB41107 Certificate IV in International Trade or other relevant qualification

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or

- with vocational experience working in an international business environment but without formal international business qualifications.

Pathways from the qualification

- BSB60207 Advanced Diploma of Business or other Advanced Diploma qualifications
-

Licensing/Regulatory Information

Licensing, **legislative**, **regulatory or certification considerations**

There is no direct link between this qualification and licensing, legislative or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability skill	**Industry or enterprise requirements for this qualification include**:
Communication	• communicating ideas and information taking into consideration international clients' diverse social and cultural needs • developing international business networks and maintaining relationships domestically and internationally • using excellent interpersonal skills and producing a wide range of reports and visual presentations
Teamwork	• coaching and mentoring staff and others in conducting businesses in new and unusual environments • defining performance measures and working collaboratively with team members • delegating and briefing various personnel on their roles and responsibilities regarding the implementation of organisational

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	plans • managing and providing feedback on individual and team performance
Problem-solving	• assessing the financial viability of new opportunities and matching organisational capability with market needs • developing a range of options in response to difficulties arising from conducting business in a complex environment
Initiative and enterprise	• developing new approaches and innovative strategies to increase performance • identifying new and emerging opportunities for the business and developing strategies to capitalise on them
Planning and organising	• allocating resources to meet organisational requirements • collecting, collating and analysing information using appropriate workplace business systems • evaluating and assessing product performance in international markets • planning for contingencies to ensure client needs are met
Self-management	• managing own time effectively • meeting compliance requirements • working within organisational policies and procedures and legislative requirements
Learning	• determining staff needs for re-training or induction to new systems, and new skill development • providing learning and development opportunities to team members • updating own knowledge on social, economic, political and business trends in international environments
Technology	• creating presentations using a range of media • using business technology, such as computers, word processing and document management software • using online technologies for research and marketing purposes

Packaging Rules

Total number of units = 8

8 elective units

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5 elective units must be selected from the Group A units listed below.

1 elective unit must be selected from either the Group A units or Group B units listed below.

2 elective units may be selected from the Group A or Group B units listed below, from this Training Package or from any current accredited course or endorsed Training Package at this qualification level or Certificate IV or Advanced Diploma level.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Group A

Financial administration

BSBFIA501A Report on finances related to international business

Marketing

BSBMKG511A Analyse data from international markets

BSBMKG512A Forecast international market and business needs

BSBMKG513A Promote products and services to international markets

BSBMKG516B Profile international markets

BSBMKG517A Analyse consumer behaviour for specific international markets

Relationship management

BSBREL501A Build international client relationships

BSBREL502A Build international business networks

Group B

Customer service

BSBCUS501C Manage quality customer service

Financial management

BSBFIM501A Manage budgets and financial plans

Information management

BSBINM501A Manage an information or knowledge management system

Innovation

BSBINN501A Establish systems that support innovation

BSBINN502A Build and sustain an innovative work environment

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Learning and development

BSBLED501A	Develop a workplace learning environment

Management

BSBMGT502B	Manage people performance
BSBMGT515A	Manage operational plan
BSBMGT516C	Facilitate continuous improvement

Occupational health and safety

BSBOHS509A	Ensure a safe workplace

Project management

BSBPMG501A	Manage application of project integrative processes
BSBPMG502A	Manage project scope
BSBPMG503A	Manage project time
BSBPMG504A	Manage project costs
BSBPMG505A	Manage project quality
BSBPMG506A	Manage project human resources
BSBPMG507A	Manage project communications
BSBPMG508A	Manage project risk
BSBPMG509A	Manage project procurement
BSBPMG510A	Manage projects

Risk management

BSBRSK501B	Manage risk

Sustainability

BSBSUS501A	Develop workplace policy and procedures for sustainability

Workplace effectiveness

BSBWOR501B	Manage personal work priorities and professional development
BSBWOR502B	Ensure team effectiveness

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BSB51107 Diploma of Management

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. BSBWOR501A updated to BSBWOR501B

Description

Descriptor

This qualification reflects the role of individuals who are engaged to manage the work of others or to add value to or review management practices. Their role may be in any industry or organisational setting. Typically people in these roles will have considerable experience in their respective industries or vocational areas and combine an informed perspective of specific work requirements with their managerial approaches. The qualification requires a sound theoretical knowledge base and managerial competencies to plan, carry out and evaluate own work or the work of a team.

Job roles

Job roles and titles vary across different industry sectors. A possible job title relevant to this qualification is:

- manager.
-

Pathways Information

Qualification pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB40807 Certificate IV in Frontline Management or other relevant qualification

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or

- with vocational experience but without formal supervision or management qualification.

Pathways from the qualification

- BSB60407 Advanced Diploma of Management or other Advanced Diploma qualifications
-

Licensing/Regulatory Information

Licensing, **legislative**, **regulatory or certification considerations**

There is no direct link between this qualification and licensing, legislative or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability skill	**Industry or enterprise requirements for this qualification include**:
Communication	• communicating with business contacts to promote the goals and objectives of the business • obtaining feedback from colleagues and clients
Teamwork	• leading, planning and supervising the performance of team members to develop team cohesion and to foster innovative work practices
Problem-solving	• accessing and assessing information for accuracy and relevance • developing strategies for minimising risks
Initiative and enterprise	• identifying networking opportunities and developing operational strategies to ensure the viability of the business • instigating new or different work practices to improve productivity or service delivery

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Planning and organising	• allocating work to meet time and budget constraints • developing plans and schedules
Self-management	• prioritising tasks
Learning	• participating in professional networks and associations to obtain and maintain personal knowledge and skills • systematically identifying learning and development needs
Technology	• using business technology to access, organise and monitor information

Packaging Rules

Total number of units = 8

8 elective units

5 elective units must be selected from the Group A units listed below.

3 elective units may be selected from Group A units or Group B units listed below, from this Training Package or from any current accredited course or endorsed Training Package at this qualification level. One unit may be selected from either a Certificate IV or Advanced Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Elective units

Group A

Customer service

BSBCUS501C Manage quality customer service

Financial management

BSBFIM501A Manage budgets and financial plans

Information management

BSBINM501A Manage an information or knowledge management system

Learning and development

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BSBLED501A Develop a workplace learning environment

Management

BSBMGT406A Plan and monitor continuous improvement

BSBMGT502B Manage people performance

BSBMGT515A Manage operational plan

BSBMGT516C Facilitate continuous improvement

Occupational health and safety

BSBOHS509A Ensure a safe workplace

Project management

BSBPMG510A Manage projects

Risk management

BSBRSK501B Manage risk

Workplace effectiveness

BSBWOR501B Manage personal work priorities and professional development

BSBWOR502B Ensure team effectiveness

Group B

Compliance

BSBCOM503B Develop processes for the management of breaches in compliance requirements

Diversity

BSBDIV501A Manage diversity in the workplace

Franchising

BSBFRA502B Manage a franchise operation

Human resource management

BSBHRM402A Recruit, select and induct staff

BSBHRM503B Manage performance management systems

BSBHRM504A Manage workforce planning

Innovation

BSBINN501A Establish systems that support innovation

BSBINN502A Build and sustain an innovative work environment

Intellectual property

BSBIPR501A Manage intellectual property to protect and grow business

Management

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BSBHRM511A Manage expatriate staff

Sustainability

BSBSUS501A Develop workplace policy and procedures for sustainability

Workplace relations

BSBWRK509A Manage industrial relations

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BSB51207 Diploma of Marketing

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07 Business Services Training Package.* Unit codes updated

Description

Descriptor

This qualification reflects the role of individuals who possess a sound theoretical knowledge base in marketing management and demonstrate a range of managerial skills to ensure that marketing functions are effectively conducted in an organisation or business area. Typically they would have responsibility for the work of other staff and lead teams in conducting marketing campaigns.

Depending on the units selected for the qualification, candidates may obtain a generic marketing qualification or specialise in direct marketing, public relations or international marketing.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- marketing manager
- marketing team leader
- product manager
- public relations manager.
-

Pathways Information

Qualification pathways

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

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- BSB41307 Certificate IV in Marketing or other relevant qualification

or

- with vocational marketing experience but new to the role of marketing team leader, supervisor or manager and without formal marketing qualifications

or

- with vocational marketing experience in marketing team leader, supervision or management, seeking to consolidate skills and knowledge in managing the marketing function in an organisation but without formal marketing qualifications.

Pathways from the qualification

- BSB60507 Advanced Diploma of Marketing or other Advanced Diploma qualifications
-

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

BSB51207 Diploma of Marketing

The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability skill	**Industry or enterprise requirements for this qualification include**:
Communication	• clearly communicating workplace information to others verbally and non-verbally • questioning to clarify and evaluate information • writing in a range of styles to suit different audiences
Teamwork	• briefing various personnel on their roles and responsibilities regarding the implementation of a marketing solution • defining performance measures and coordinating the activities

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	of team members • implementing team building strategies
Problem-solving	• determining, modifying and adjusting the optimal marketing mix • performing revenue and cost analysis and working within budget • solving workplace issues and problems either individually or with assistance of team members
Initiative and enterprise	• assessing and evaluating the financial viability of making changes • encouraging creative and innovative workplace solutions • identifying new and emerging opportunities for the business and developing strategies to capitalise on them • managing, fostering and facilitating change
Planning and organising	• collecting, collating and analysing information using appropriate workplace business systems • developing systems that are flexible and responsive to changing circumstances • managing resource acquisition and deployment within budgetary constraints • planning complex projects • planning for contingencies
Self-management	• managing own time and priorities and dealing with contingencies • taking responsibility as required by job role and ensuring organisational policies and procedures are adhered to
Learning	• contributing to the learning of others through implementing team building and organisational development activities • receiving and giving feedback, and providing coaching and mentoring
Technology	• using computerised systems, software and telecommunication devices to process and analyse data and to create documents • using technology to assist the management of information and to assist in planning processes • using technology to record and generate ideas

Packaging Rules

Total number of units = 8

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8 elective units

5 elective units must be selected from the Group A elective units below.

At least **2 elective units** must be selected from the Group B elective units below.

1 elective unit may be selected from the remaining Group A or Group B units, from this Training Package or from any current accredited course or endorsed Training Package at this qualification level or Certificate IV or Advanced Diploma level.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Group A elective units

Marketing

BSBMKG501B	Identify and evaluate marketing opportunities
BSBMKG502B	Establish and adjust the marketing mix
BSBMKG506B	Plan market research
BSBMKG507A	Interpret market trends and developments
BSBMKG514A	Implement and monitor marketing activities
BSBMKG515A	Conduct a marketing audit

Group B elective units

Advertising

BSBADV507B	Develop a media plan
BSBMKG523A	Design and develop an integrated marketing communication plan

Financial administration

BSBFIA501A Report on finances related to international business

Financial management

BSBFIM501A Manage budgets and financial plans

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Marketing

BSBMKG409A	Design direct response offers
BSBMKG508A	Plan direct marketing activities
BSBMKG509A	Implement and monitor direct marketing activities
BSBMKG510B	Plan e-marketing communications
BSBMKG511A	Analyse data from international markets
BSBMKG512A	Forecast international market and business needs
BSBMKG513A	Promote products and services to international markets
BSBMKG516B	Profile international markets
BSBMKG517A	Analyse consumer behaviour for specific international markets
BSBMKG518A	Plan and implement services marketing
BSBMKG519A	Plan and implement business-to-business marketing
BSBMKG520A	Manage compliance within the marketing legislative framework
BSBMKG521A	Plan and implement sponsorship and event marketing
BSBMKG522A	Plan measurement of marketing effectiveness

Public relations

BSBPUB501A	Manage the public relations publication process
BSBPUB502A	Develop and manage complex public relations campaigns
BSBPUB503A	Manage fundraising and sponsorship activities
BSBPUB504A	Develop and implement crisis management plans

Relationship management

BSBREL501A	Build international client relationships
BSBREL502A	Build international business networks

Sales

BSBSLS501A	Develop a sales plan
BSBSLS502A	Lead and manage a sales team

Sustainability

BSBSUS501A	Develop workplace policy and procedures for sustainability

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Writing

BSBWRT501A Write persuasive copy

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BSB51307 Diploma of Occupational Health and Safety

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed

Description

Descriptor

This qualification reflects the role of individuals who coordinate and maintain the OHS program within an organisation. Individuals would possess a sound theoretical knowledge base and use a range of specialised, technical or managerial competencies to plan, carry out and evaluate their own work and the work of others with safety responsibilities.

Job Roles

- OHS Manager
- OHS Practitioner
- Senior OHS Officer.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB41407 Certificate IV in Occupational Health and Safety or other relevant qualification/s

OR

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- with extensive vocational experience in providing guidance to others in matters relating to occupational health and safety but without formal OHS qualifications

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Occupational Health and Safety Coordinator
- Occupational Health and Safety Officer.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB60607 Advanced Diploma of Occupational Health and Safety.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Qualification Code and Title The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Communication	• consulting with internal and external stakeholders • determining appropriate format for occupational health and safety documentation • preparing statutory reports as required • questioning, clarifying and evaluating information
Teamwork	• defining performance measures and working collaboratively with team members • supporting managers and team members • utilising participative arrangements to develop processes
Problem-solving	• analysing data and evaluating the effectiveness of systems • calculating resource requirements and acquiring them • dealing with barriers to the successful implementation of occupational health and safety systems • developing, implementing and monitoring contingency management strategies • identifying hazards, assessing and controlling risk through appropriate control measures • solving complex and non-routine difficulties • using a variety of problem solving and decision making strategies
Initiative and enterprise	• integrating occupational health and safety into other functional areas and management systems • responding to new and changing circumstances and implementing improvements to occupational health and safety management, information and data systems
Planning and organising	• collecting, collating and analysing information using appropriate workplace business systems • developing systems that are flexible and responsive to changing circumstances • planning and managing resource acquisition and deployment within budgetary constraints
Self-management	• ensuring work practices are ethical and performed professionally at all times • managing own time and priorities and dealing with contingencies • taking responsibility as required by work role and ensuring all organisational polices and procedures are followed
Learning	• counselling staff as required on skill development requirements • monitoring and facilitating occupational health and training programs • providing learning and development opportunities

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Technology	• using risk analysis tools and tools for occupational health and safety research • using software systems to create occupational health and safety documents, flowcharts, schedules and graphs • using technology to assist the management of information and to assist the planning process

Packaging Rules

Total number of units = 8

8 elective units

5 elective units must be selected from the **Group A** units listed below.

The remaining **3 elective units** may be selected from the **Group A** or the **Group B** units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from either a Certificate IV or Advanced Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Elective units

Group A units

BSBOHS501B Participate in the coordination and maintenance of a systematic approach to managing OHS

BSBOHS502B Participate in the management of the OHS information and data systems

BSBOHS503B Assist in the design and development of OHS participative arrangements

BSBOHS504B Apply principles of OHS risk management

BSBOHS505C Manage hazards in the work environment

BSBOHS508B Participate in the investigation of incidents

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Group B units

BSBOHS506B	Monitor and facilitate the management of hazards associated with plant
BSBOHS507B	Facilitate the application of principles of occupational health to control OHS risk
BSBSUS501A	Develop workplace policy and procedures for sustainability

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BSB51407 Diploma of Project Management

Modification History

Not applicable.

Description

Descriptor

This qualification reflects the role of individuals who possess a sound theoretical knowledge base and use a range of specialised, technical or managerial competencies to plan, carry out and evaluate their own work and/or the work of a team.

Job Roles

- Project Leader
- Project Management Facilitator
- Project or Program Administrator.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB41507 Certificate IV in Project Management or other relevant qualification/s

OR

- with extensive vocational experience in project roles where they may have had some limited responsibility for the output of others, and without a formal project management qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Project Coordinator
- Project Management Officer
- Project Team Member

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- Project or Program Administrator.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB60707 Advanced Diploma of Project Management.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Qualification Code and Title The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• consulting with stakeholders and others on developing a range of project management related plans • negotiating contracts and solutions to new and emerging issues • utilising excellent interpersonal skills and producing a wide range of reports and charts to document project progress, milestones and outcomes

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Teamwork	• defining performance measures and managing the work of others through positive leadership • delegating roles and responsibilities to team for the implementation of project plans
Problem-solving	• analysing data and evaluating the effectiveness of systems • calculating resource requirements and acquiring them • designing control mechanisms and evaluating procedures • implementing continuous improvement processes as required • performing cost benefit analyses, budgeting, assessing and managing risk • solving complex and non-routine difficulties • tracking and monitoring projects • using a variety of problem-solving and decision-making strategies
Initiative and enterprise	• responding to new and changing circumstances to ensure project outcomes remain achievable • reviewing processes to inform future activity
Planning and organising	• developing a quality assurance process and applying appropriate techniques and tools • planning and managing projects in respect to time, cost, quality and resource management • undertaking contingency planning and integrating all project processes
Self-management	• managing own time and priorities and dealing with contingencies • taking responsibility as required by work role and ensuring all organisational polices and procedures are followed • using discretion and judgement required within complex environments • using judgement in planning and selecting resources for oneself and others
Learning	• providing learning and development opportunities for the project team • counselling staff as required on skill development requirements
Technology	• using electronic communication devices and processes such as internet, intranet, email, to produce written correspondence and reports • using project management specific software including time analysis and risk analysis tools • using technology to assist the management of information and to assist the planning process

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Packaging Rules

Packaging Rules	
Total number of units = 9	
9 core units	
Core units	
Project Management	
BSBPMG501A	Manage application of project integrative processes
BSBPMG502A	Manage project scope
BSBPMG503A	Manage project time
BSBPMG504A	Manage project costs
BSBPMG505A	Manage project quality
BSBPMG506A	Manage project human resources
BSBPMG507A	Manage project communications
BSBPMG508A	Manage project risk
BSBPMG509A	Manage project procurement

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BSB51507 Diploma of Purchasing

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. • BSBCUS501B now BSBCUS501C • BSBPUR501B now BSBPUR501C • BSBPUR503B now BSBPUR503C • BSBRSK501A now BSBRSK501B • PSPPROC503A updated to PSPPROC503B • PSPPROC504A updated to PSPPROC504B • Outdated advice removed

Description

Descriptor

This qualification reflects the role of individuals who possess a sound theoretical knowledge base in purchasing and demonstrate a range of managerial skills to ensure that purchasing activities are effectively conducted in an organisation or business area. Typically they would have responsibility for the work of other staff. They may work in any industry or organisational setting. They may have whole of procurement life cycle responsibilities or work in specific functions such as contract management or tendering.

Job Roles

- Contract Manager
- Inventory and Purchasing Manager
- Purchasing Consultant
- Purchasing Coordinator
- Purchasing Manager
- Site and Purchasing Coordinator.
-

Pathways Information

Qualification Pathways

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Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB41607 Certificate IV in Purchasing or other relevant qualification/s

OR

- vocational experience in assisting senior strategic procurement managers to manage purchasing activities but without formal purchasing qualifications.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Project Coordinator
- Project Management Officer
- Project Team Member
- Project or Program Administrator.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB60407 Advanced Diploma of Management.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

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Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• conducting research to collect and analyse information and presenting it in report form • consulting and negotiating with internal and external stakeholders • negotiating contracts and using culturally appropriate communication when dealing with international clients • questioning, clarifying and evaluating information • resolving disagreements with suppliers • writing in a range of styles to suit different audiences
Teamwork	• building trust and fostering a supply chain culture • supporting staff and networking with others • working with others and clearly identifying their roles and responsibilities
Problem-solving	• analysing data and evaluating the effectiveness of systems • assessing financial viability of new opportunities and matching organisational capability with market needs • calculating resource requirements and acquiring them • comparing and evaluating data and reports • developing strategies for improvement to business processes and systems • performing cost benefit analyses, budgeting, assessing and managing risk • solving complex and non-routine difficulties • using a variety of problem-solving and decision making strategies
Initiative and enterprise	• determining logistics strategies and adjusting them in accordance with new and changing market needs • improving systems and structures based on review and analysis of information
Planning and organising	• applying strategic, supply chain and project management skills in complex environments • developing systems that are flexible and responsive to changing circumstances

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	• planning and managing resource acquisition and deployment within budgetary constraints • planning for contingencies and performance
Self-management	• managing own time and priorities, and dealing with contingencies • taking responsibility as required by work role and ensuring all legislative and organisational polices and procedures are followed • using discretion and judgement when required within complex environments
Learning	• following cultural requirements when dealing with international clients • providing learning and development opportunities for staff • supporting first time users of online purchasing systems
Technology	• analysing the technical requirements for online purchasing • reviewing technical performance and making improvements as required • using specialist software to manage international purchasing and supply chain management

Packaging Rules

Total number of units = 8

5 core units plus

3 elective units

2 elective units must be selected from the elective units listed below.

The remaining **1 elective unit** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from either a Certificate IV or Advanced Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification.

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Core units

Purchasing and Contracting

BSBPUR501C	Develop, implement and review purchasing strategies
BSBPUR502B	Manage supplier relationships
BSBPUR504B	Manage a supply chain

Recordkeeping

BSBRKG502B	Manage and monitor business or records systems

Risk Management

BSBRSK501B	Manage risk

Elective units

Customer Service

BSBCUS501C	Manage quality customer service

Financial Management

BSBFIM501A	Manage budgets and financial plans

Information Management

BSBINM501A	Manage an information or knowledge management system

Learning and Development

BSBLED501A	Develop a workplace learning environment

Management

BSBMGT502B	Manage people performance
BSBMGT516C	Facilitate continuous improvement

Occupational Health and Safety

BSBOHS509A	Ensure a safe workplace

Purchasing and Contracting

BSBPUR503C	Manage international purchasing

Sustainability

BSBSUS501A	Develop workplace policy and procedures for sustainability

Workplace Effectiveness

BSBWOR501B	Manage personal work priorities and professional development
BSBWOR502B	Ensure team effectiveness

Imported units

PSPPROC502A	Establish contract management arrangements

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PSPPROC503B	Manage contract performance
PSPPROC504B	Finalise contracts

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BSB51607 Diploma of Quality Auditing

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. • Unit codes updated • Outdated advice removed

Description

Descriptor

This qualification reflects the role of individuals who possess a sound theoretical knowledge base and use a range of specialised, technical or managerial competencies to plan, carry out and evaluate their own work and/or the work of a team.

Job Roles

- Quality Assurance Manager
- Quality Facilitator
- Quality and Improvement Consultant
- Service Quality System Support Analyst.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB40207 Certificate IV in Business or other relevant qualification/s

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OR

- with extensive vocational experience in auditing and without formal auditing qualifications.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Administrator
- Project Officer
- Quality Assurance Officer.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake a qualification in a specialist area within this Training Package such as marketing, management, human resources.

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Communication	• adjusting interpersonal styles and methods as required • communicating ideas and information to a wide range of persons • consulting, questioning, clarifying and evaluating information • negotiating follow-up action as required • using excellent verbal and written skills to gather information and present formal audit reports
Teamwork	• providing feedback to team members on their performance • working with others and delegating roles and responsibilities to team members
Problem-solving	• collecting, analysing, comparing and contrasting data • providing strategies on how to address non-compliances • solving problems in respect to risk and knowledge management systems
Initiative and enterprise	• adopting innovative approaches to learning and improving team members' skills • identifying areas for improvement and recommending value adding activities • leading an audit and offering flexible approaches to suit client's business
Planning and organising	• identifying risk and developing strategies to deal with it • planning audit schedule and identifying resources required • planning for contingencies, and monitoring and reviewing systems and activities
Self-management	• managing own time and performance • reflecting on own performance as an auditor • working within organisational policies, procedures and legislative requirements
Learning	• developing and maintaining own professional competence • identifying learning needs and facilitating the management of knowledge • maintaining currency of knowledge and skills in respect to risk and knowledge management
Technology	• aligning data and information systems with the knowledge management system • using technology to assist the management of information and to assist the planning process • using word processing software and risk analysis tools

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Packaging Rules

Total number of units = 8

8 elective units

3 elective units must be selected from the **Group A** units listed below.

2 elective units must be selected from the **Group A** or **Group B** units listed below or from an equivalent level qualification within this Training Package.

The remaining **3 elective units** may be selected from the **Group A** or **Group B** units listed below, or any currently endorsed Training Package, or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from either a Certificate IV or Advanced Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Elective units

Group A units

Information Management

BSBINM501A	Manage an information or knowledge management system

Quality Auditing

BSBAUD402B	Participate in a quality audit
BSBAUD501B	Initiate a quality audit
BSBAUD503B	Lead a quality audit
BSBAUD504B	Report on a quality audit

Risk Management

BSBRSK501B	Manage risk

Group B units

Management

BSBMGT502B	Manage people performance
BSBMGT516C	Facilitate continuous improvement

Project Management

BSBPMG505A	Manage project quality

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Sustainability

BSBSUS501A Develop workplace policy and procedures for sustainability

Workplace Effectiveness

BSBWOR502B Ensure team effectiveness

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BSB51707 Diploma of Recordkeeping

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07 Business Services Training Package.* Unit codes updated

Description

Descriptor

This qualification reflects the role of individuals who possess a sound theoretical knowledge base in information and records management and use a range of specialised, technical or managerial competencies to ensure that business or records systems function effectively within an organisation. Typically they will work closely with other members of an organisation and have a high degree of autonomy with regards to business or records systems.

Job Roles

- Records and Information Coordinator
- Records and Information Supervisor
- Records and Information Team Leader.
-

Pathways Information

Qualification Pathways

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB41707 Certificate IV in Recordkeeping or other relevant qualification/s

OR

- with vocational recordkeeping experience, but without a formal qualification.

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Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Records and Information Officer
- Records and Information Clerk.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB60807 Advanced Diploma of Recordkeeping.
-

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

BSB51707 Diploma of Recordkeeping

The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• negotiating solutions for workplace issues • researching the recordkeeping requirements and terminology used in an organisation • writing clear and succinct reports, and system procedures and rules
Teamwork	• consulting with team members and other organisational staff to establish recordkeeping requirements

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	• providing feedback and instruction to system users
Problem-solving	• developing classification schemes in line with organisational requirements • developing strategies for implementation of business or records systems
Initiative and enterprise	• addressing new and changing circumstances to ensure accurate and timely retrieval of records • identifying new and emerging opportunities to increase effectiveness of business and records systems
Planning and organising	• collecting, collating and analysing information using appropriate workplace business systems • developing staff key performance indicators to monitor staff performance and using them in relation to business or records systems
Self-management	• acting as an advocate for the use and take up of business or records systems • managing own time and priorities and dealing with contingencies • taking responsibility as required by work role and ensuring all legislative and organisational polices and procedures are adhered to
Learning	• evaluating and improving training systems • identifying training needs • selecting and inducting staff
Technology	• using electronic communication devices and processes such as internet, intranet, email to produce written correspondence and reports • using technology to assist the management of information, to assist the planning process and to facilitate change

Packaging Rules

Total number of units = 8

3 core units plus

5 elective units

2 elective units must be selected from the elective units listed below or from an equivalent level qualification within this Training Package.

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The remaining **3 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from either a Certificate IV or Advanced Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

Recordkeeping

BSBRKG502B	Manage and monitor business or records systems
BSBRKG505B	Document or reconstruct a business or records system
BSBRKG506A	Develop and maintain terminology and classification schemes

Elective units

Customer Service

BSBCUS501C	Manage quality customer service

General Administration

BSBADM502B	Manage meetings
BSBADM506B	Manage business document design and development

Information Management

BSBINM501A	Manage an information or knowledge management system

Innovation

BSBINN301A	Promote innovation in a team environment

Management

BSBMGT502B	Manage people performance
BSBMGT515A	Manage operational plan

Project Management

BSBPMG510A	Manage projects

Risk Management

BSBRSK501B	Manage risk

Sustainability

BSBSUS501A	Develop workplace policy and procedures for sustainability

Workplace Effectiveness

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BSBWOR501B	Manage personal work priorities and professional development
BSBWOR502B	Ensure team effectiveness

Selecting Elective Units for Different Outcomes

The context for this qualification varies and this must guide the selection of elective units. An example of appropriate elective units for a particular outcome follows.

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BSB51807 Diploma of Unionism and Industrial Relations

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. • Outdated advice removed • Unit codes updated

Description

Descriptor

This qualification reflects the role of individuals who possess a sound theoretical knowledge base in unionism and industrial relations and use a range of specialised, technical or managerial competencies to plan, carry out and evaluate their own work and/or the work of a team.

Job Roles

- Union Official.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Preferred pathways for candidates considering this qualification include:

- BSB41807 Certificate IV in Unionism and Industrial Relations or other relevant qualification/s

OR

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- with vocational experience in unionism but without a formal qualification

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Union Organiser
- Workplace Union Representative.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may undertake:

- BSB60407 Advanced Diploma of Management.
-

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• conciliating and arbitrating on behalf of union members • consulting with stakeholders • managing conflict and resolving disputes • negotiating solutions for workplace issues

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	• presenting information in a range of styles to suit a particular audience • questioning, clarifying and evaluating information • using advocacy skills to represent workers • using persuasive questioning techniques
Teamwork	• applying teamwork skills to organise and allocate responsibilities in negotiation and bargaining • providing support for union organisers and coaching/mentoring as required • working with diverse individuals and groups
Problem-solving	• budgeting for campaigns or projects • managing risk and developing contingency plans • taking action to resolve worker issues • thinking laterally when encountering resistance to proposed solutions to workplace issues
Initiative and enterprise	• being creative and providing innovative solutions to complex issues • developing a range of options when preparing cases for court or tribunal • implementing continuous improvement processes • making strategic decisions
Planning and organising	• allocating resources as required • collecting and analysing information and presenting it in an appropriate format • conducting risk management audits and preparing action plans • evaluating processes and recommending changes • planning and managing major research projects • planning, managing and reviewing campaigns
Self-management	• having personal goals and vision for future campaigns • managing own time and priorities and dealing with contingencies • taking responsibility as required by work role and ensuring all organisational polices and procedures are followed
Learning	• developing and maintaining professional competence in risk management • maintaining knowledge of current industrial relations environment • providing learning and development opportunities • recording and monitoring staff training in risk management
Technology	• preparing and filing forms electronically • using business technology such as computers, and word

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	processing and document management software • using risk analysis software tools • using the internet and web for research purposes

Packaging Rules

Total number of units = 8

3 core units plus

5 elective units

2 elective units must be selected from the **Group A** units listed below.

The remaining **3 elective units** may be selected from the **Group A** or **Group B** units listed below, or any currently endorsed national Training Package or accredited course at the same qualification level. If not listed below **1 unit** may be selected from either a Certificate IV or Advanced Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core Units

Risk Management

BSBRSK501B Manage risk

Workplace Relations

BSBWRK405A Promote union values, principles and policies

BSBWRK507A Apply strategic unionism

Group A units

Workplace Relations

BSBWRK501A Develop, manage and review campaigns and projects

BSBWRK502A Represent the union in key forums

BSBWRK503A Coordinate case preparation and research

BSBWRK504A Advocate and present cases for members

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BSBWRK505A	Develop, implement and manage union policy
BSBWRK506A	Coordinate research and analysis
BSBWRK508A	Manage and oversee bargaining

Group B units

Advertising

BSBADV507B	Develop a media plan

Compliance

BSBCOM502B	Evaluate and review compliance

Financial Management

BSBFIM501A	Manage budgets and financial plans

General Administration

BSBADM502B	Manage meetings

Human Resource Management

BSBHRM503B	Manage performance management systems

Information Management

BSBINM501A	Manage an information or knowledge management system

Learning and Development

BSBLED501A	Develop a workplace learning environment

Management

BSBMGT502B	Manage people performance
BSBMGT515A	Manage operational plan
BSBMGT516C	Facilitate continuous improvement

Occupational Health and Safety

BSBOHS509A	Ensure a safe workplace

Project Management

BSBPMG510A	Manage projects

Public Relations

BSBPUB504A	Develop and implement crisis management plans

Sustainability

BSBSUS501A	Develop workplace policy and procedures for sustainability

Workplace Effectiveness

BSBWOR501B	Manage personal work priorities and professional development

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BSBWOR502B Ensure team effectiveness

•

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BSB60110 Advanced Diploma of Advertising

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07 Business Services Training Package.* Unit codes updated

Description

Descriptor

This qualification reflects the role of individuals who provide leadership and strategic direction for the advertising activities of an organisation. They analyse, design and execute judgements using wide-ranging technical, creative, conceptual and managerial competencies. Their knowledge base may be highly specialised or broad within the advertising field. These individuals are often accountable for group outcomes and for the overall performance of the advertising function in an organisation.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- account director
- account planning manager
- client services executive
- client services director.
-

Pathways Information

Qualification pathways

Pathways into the qualification

Candidates may enter the qualification through a number of entry points demonstrating potential to undertake vocational education and training at advanced diploma level, including:

- BSB50107 Diploma of Advertising or other relevant qualification

or

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- with substantial vocational advertising experience, with overall responsibility for providing strategic direction and planning for an organisation's advertising function, either domestically or internationally but without formal advertising qualifications

or

- with substantial vocational experience in senior advertising positions with a wide range of skills in a specialised advertising discipline and looking to consolidate specialist advertising skills with more generic management skills and without formal advertising qualifications.
-

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

BSB60110 Advanced Diploma of Advertising

The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability skill	**Industry or enterprise requirements for this qualification include**:
Communication	• consulting and negotiating with internal and external stakeholders on the organisation's strategic direction • consulting, questioning, clarifying and evaluating information • negotiating contracts • preparing advertising briefs, marketing communications and media plans • presenting information in report form • using culturally appropriate communication when dealing with international clients • writing in a range of styles to suit different audiences

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Teamwork	• giving feedback and providing coaching and mentoring to staff • identifying and using the strengths of team members • working with diverse groups and individuals
Problem-solving	• addressing media placement problems • managing risk and developing contingency plans • monitoring advertising campaign performance measures and taking appropriate action if discrepancies appear against planned objectives • working individually or within teams to resolve client concerns about advertising campaigns
Initiative and enterprise	• developing creative briefs • exploring joint ventures and strategic alliances • generating a range of options in response to workplace challenges • identifying trends and developments domestically and internationally, and investigating their viability • scoping domestic and international advertising opportunities
Planning and organising	• analysing and reviewing the organisation's capabilities • applying the organisation's mission and vision in the strategic planning process • developing quality assurance processes and applying appropriate techniques and tools • identifying resource requirements and allocating to fit within budget constraints • planning and managing projects in respect to time, cost, quality and resource management • planning for contingencies and integrating all campaign processes
Self-management	• managing own time and priorities and dealing with contingencies • taking responsibility as required by job role and ensuring organisational policies and procedures are followed • working within organisational policies and procedures and legislative requirements
Learning	• evaluating advertising production process and media campaign performance • learning ways to influence, modify and adapt to the external environment • maintaining current knowledge of products and processes
Technology	• monitoring progress of advertising campaigns • using appropriate software • using electronic communication devices and processes to produce written correspondence and reports, such as internet,

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	intranet and email • using online technologies for research and marketing purposes

Packaging Rules

Total number of units = 8

5 core units *plus*

3 elective units

2 of the elective units must be selected from the elective units listed below.

1 elective unit may be selected from the elective units listed below, from this Training Package or from any current accredited course or endorsed Training Package. If not listed below, the unit may be selected from a Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

BSBADV602B	Develop an advertising campaign
BSBADV603B	Manage advertising production
BSBADV604B	Execute an advertising campaign
BSBADV605B	Evaluate campaign effectiveness
BSBMKG523A	Design and develop an integrated marketing communication plan

Elective units

Compliance

BSBCOM603C	Plan and establish compliance management systems

Creating thinking

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BSBCRT501A Originate and develop concepts

Design process

BSBDES601A Manage design realisation

BSBDES602A Research global design trends

Diversity

BSBDIV601A Develop and implement diversity policy

Financial management

BSBFIM601A Manage finances

Human resource management

BSBHRM602B Manage human resources strategic planning

Information management

BSBINM601A Manage knowledge and information

Innovation

BSBINN601B Manage organisational change

Management

BSBMGT605B Provide leadership across the organisation

BSBMGT608C Manage innovation and continuous improvement

BSBMGT615A Contribute to organisation development

BSBMGT616A Develop and implement strategic plans

BSBMGT617A Develop and implement a business plan

Marketing

BSBMKG611A Manage measurement of marketing effectiveness

BSBMKG603B Manage the marketing process

BSBMKG607B Manage market research

BSBMKG608A Develop organisational marketing objectives

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BSBMKG609A Develop a marketing plan

Occupational health and safety

BSBOHS601B Develop a systematic approach to managing OHS

Sustainability

BSBSUS501A Develop workplace policy and procedures for sustainability

Imported units

PSPGOV602B Establish and maintain strategic networks

PSPPROC602B Direct the management of contracts

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BSB60207 Advanced Diploma of Business

Modification History

Not applicable.

Description

Descriptor

This qualification reflects the role of individuals with significant expertise in either specialised or broad areas of skills and knowledge who are seeking to further develop expertise across a range of business functions. The qualification is suited to the needs of individuals who possess significant theoretical business skills and knowledge that they would like to develop in order to create further educational or employment opportunities.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- senior administrator
- senior executive.
-

Pathways Information

Qualification pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Candidates may enter the qualification through a number of entry points demonstrating potential to undertake vocational education and training at advanced diploma level, including:

- BSB50207 Diploma of Business or other relevant qualification

or

- with substantial vocational experience in a range of environments, acting in a range of senior support or technical roles.
-

Licensing/Regulatory Information

Licensing, legislative, regulatory or certification considerations

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There is no direct link between this qualification and licensing, legislative or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
BSB60207 Advanced Diploma of Business The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability skill	**Industry or enterprise requirements for this qualification include**:
Communication	• conducting research to collect and analyse information in a range of reports • consulting with others to develop a range of operational plans • liaising with stakeholders and promoting participative workplace arrangements • negotiating solutions to new and emerging issues
Teamwork	• managing and developing others to be effective and empowered team members • managing and providing feedback on individual and team performance
Problem-solving	• assessing financial viability of new opportunities and matching organisational capability with market needs • developing and managing risk management and contingency plans
Initiative and enterprise	• encouraging creative and innovative workplace solutions • identifying new and emerging opportunities for the business and developing strategies to capitalise on them • managing, fostering and facilitating change
Planning and organising	• developing systems that are flexible and responsive to changing circumstances

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	• planning for contingencies and performance of staff and systems
Self-management	• dealing with contingencies • managing own time and priorities • taking responsibility as required by job role and ensuring organisational policies and procedures are adhered to
Learning	• coaching and mentoring others to acquire new knowledge and skills • managing the performance of team members by regular monitoring and review
Technology	• using electronic communication devices and processes, such as internet, intranet and email to produce written correspondence and reports • using technology to assist the management of information and to assist the planning process

Packaging Rules

Packaging Rules

Total number of units = 8 elective units

6 elective units must be selected from the list below, with no more than 3 units selected from any one group.

2 elective units may be selected from the units listed below, from this Training Package or from any current accredited course or endorsed Training Package at this qualification level or Diploma level.

The units selected must be relevant to the work outcome, local industry requirements and the qualification level.

Elective units

Group A

Advertising

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BSBADV602B	Develop an advertising campaign
BSBADV603B	Manage advertising production
BSBADV604B	Execute an advertising campaign
BSBADV605B	Evaluate campaign effectiveness

Group B

Human resource management

BSBHRM602B	Manage human resources strategic planning

Information management

BSBINM601A	Manage knowledge and information

Innovation

BSBINN601B	Manage organisational change

Management

BSBMGT615A	Contribute to organisation development

Group C

Marketing

BSBMKG603B	Manage the marketing process
BSBMKG605B	Evaluate international marketing opportunities
BSBMKG606B	Manage international marketing programs
BSBMKG607B	Manage market research
BSBMKG608A	Develop organisational marketing objectives
BSBMKG609A	Develop a marketing plan

Group D

Continuity

BSBCON701A	Establish and review the business continuity management framework and strategies

Financial management

BSBFIM601A	Manage finances

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Information management	
BSBINM601A	Manage knowledge and information
Intellectual property	
BSBIPR601A	Develop and implement strategies for intellectual property management
Sustainability	
BSBSUS501A	Develop workplace policy and procedures for sustainability

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BSB60407 Advanced Diploma of Management

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. • Qualification updated to include Contact Centre Operations units of competency as electives. • Outdated advice removed • unit codes updated

Description

Descriptor

This qualification reflects the role of individuals who have senior or managerial responsibilities. They may oversee the work of others or have specialised roles where they do not supervise others but provide strategic leadership.

Job Roles

- Area Manager
- Department Manager
- Regional Manager.
-

Pathways Information

Pathways into the qualification

Candidates may enter the qualification through a number of entry points including:

- BSB51107 Diploma of Management or other relevant qualification/s

OR

- with substantial vocational experience, in management but without a formal qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Manager.

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This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may choose to undertake studies at higher education level.

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Entry requirements

There are no entry requirements for this qualification.

Employability Skills Summary

The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• consulting, questioning, clarifying and evaluating information • interpreting customer needs • negotiating budgets and plans and then re-developing as required to meet organisational needs • negotiating with internal and external stakeholders • utilising excellent interpersonal skills, and producing a wide range of reports and making presentations as required
Teamwork	• briefing various personnel on their roles and responsibilities regarding the implementation of the marketing plan • coordinating resources and developing systems to manage team and individual performance • defining performance measures and working collaboratively with team members • identifying performance gaps and taking remedial action for

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	underperformance
Problem-solving	• assessing financial viability of new opportunities and matching organisational capability with market needs • collecting and analysing data • comparing and contrasting data • conducting situational analyses • developing and managing risk and contingency plans • developing strategies for improvement • performing cost benefit analyses, budgeting, assessing and managing risk
Initiative and enterprise	• evaluating and improving market performance • identifying strengths and opportunities within organisation's projected capabilities and resources
Planning and organising	• collecting, collating and analysing information using appropriate workplace business systems • developing customer acquisition and retention strategies • developing systems that are flexible and responsive to changing circumstances • evaluating processes and making changes as required • planning and managing resource acquisition and deployment within budgetary constraints • planning for contingencies
Self-management	• applying discretion and judgement within complex environments • managing own time and performance • using judgement in planning and in the selection and allocation of resources • working within organisational policies and procedures and legislative requirements
Learning	• coaching and mentoring others to acquire new knowledge and skills • providing learning and development opportunities
Technology	• creating presentations using a range of media • using computerised systems, software and telecommunication devices • using technology to assist with the management of information and to assist the planning process • using technology to record and generate ideas

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Packaging Rules

Total number of units = 8

3 core units plus

5 elective units

3 elective units must be selected from the elective units listed below.

The remaining **2 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from a Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core Units

BSBINN601B Manage organisational change

BSBMGT605B Provide leadership across the organisation

BSBMGT616A Develop and implement strategic plans

Elective units

BSBCCO601B Optimise customer contact operations

BSBCCO602B Manage customer contact information

BSBCCO603C Design and launch new customer contact facilities

BSBCCO604B Develop and maintain a service level strategy

BSBCCO605B Develop and maintain a customer contact marketing strategy

BSBCCO606B Forecast and plan using customer contact traffic information analysis

BSBCCO607B Manage customer contact centre staffing

BSBCCO608B Manage customer contact operational costs

BSBCOM603C Plan and establish compliance management systems

BSBDIV601A Develop and implement diversity policy

BSBFIM601A Manage finances

BSBINM601A Manage knowledge and information

BSBIPR601A Develop and implement strategies for intellectual property management

BSBMGT608C Manage innovation and continuous improvement

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BSBMGT617A	Develop and implement a business plan
BSBMKG609A	Develop a marketing plan
BSBOHS601B	Develop a systematic approach to managing OHS
BSBRKG601B	Define recordkeeping framework
BSBRSK501B	Manage risk
BSBSUS501A	Develop workplace policy and procedures for sustainability
PSPGOV602B	Establish and maintain strategic networks
PSPPROC602B	Direct the management of contracts

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BSB60507 Advanced Diploma of Marketing

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07 Business Services Training Package.* unit codes updated

Description

Descriptor

This qualification reflects the role of individuals who provide leadership and strategic direction in the marketing activities of an organisation. They analyse, design and execute judgements using wide-ranging technical, creative, conceptual and managerial competencies. Their knowledge base may be highly specialised or broad within the marketing field. These individuals are often accountable for group outcomes and for the overall performance of the marketing function of an organisation.

Job roles

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- marketing director
- marketing strategist
- national, regional or global marketing manager.
-

Pathways Information

Qualification pathways

Pathways into the qualification

Candidates may enter the qualification through a number of entry points demonstrating potential to undertake vocational education and training at advanced diploma level, including:

- BSB51207 Diploma of Marketing or other relevant qualification

or

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- with substantial vocational marketing experience, with overall responsibility for providing strategic direction and planning for an organisation's marketing function, either domestically or internationally but without a formal marketing qualification

or

- with extensive vocational marketing experience in senior marketing positions with a wide range of skills in a specialised marketing communications discipline and looking to consolidate specialist marketing skills with more generic management skills, but without a formal marketing qualification.
-

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

BSB60507 Advanced Diploma of Marketing

The following table contains a summary of the employability skills required by industry for this qualification. The employability skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability skill	**Industry or enterprise requirements for this qualification include**:
Communication	• effectively using culturally appropriate communication • establishing and using appropriate formal or informal networks • negotiating budgets, strategic and operational plans and re-developing them as required to meet organisational needs • negotiating contracts • negotiating solutions to new and emerging issues • producing a wide range of reports and making presentations
Teamwork	• defining performance measures and working collaboratively with team members • delegating and briefing various personnel on their roles and responsibilities regarding the implementation of strategic,

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	marketing and other business plans • demonstrating leadership in evaluating policies and procedures • identifying performance gaps and taking remedial action for under-performance • producing a positive and productive workplace that encourages maximum participation
Problem-solving	• assessing financial viability of new opportunities and matching organisational capability with market needs • comparing and evaluating data and reports • developing and managing risk and contingency plans • interpreting forecasts when analysing potential overseas markets • resolving employee relations problems • reviewing market performance
Initiative and enterprise	• exploring joint ventures and strategic alliances • identifying trends and developments domestically and internationally, and investigating their viability • managing diversity and identifying opportunities for improved communication and processes • scoping international marketing opportunities
Planning and organising	• demonstrating excellent project management skills across the business • developing systems that are flexible and responsive to changing circumstances • implementing, reviewing and evaluating systems and processes • monitoring marketing performance against established targets • planning for contingencies
Self-management	• applying discretion and judgement within complex environments • applying the organisation's workplace vision and mission • managing own time and priorities and dealing with contingencies • taking responsibility as required by job role and ensuring organisational policies and procedures are followed
Learning	• coaching under-performers and developing education plans that promote and encourage performance • providing induction and training for specific job roles • providing learning and development opportunities
Technology	• creating presentations using a range of media • using business technology, such as risk analysis tools and word processing and document management software • using online technologies for research and marketing purposes • using technology to assist the management of information and

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	to assist in the planning process

Packaging Rules

Total number of units = 8

4 core units *plus*

4 elective units

At least **3 of the elective units** must be selected from the elective units listed below.

The **remaining elective unit** may be selected from elective units listed below, from this Training Package or from any current accredited course or endorsed Training Package at this qualification level or Diploma level.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

BSBMKG603B	Manage the marketing process
BSBMKG607B	Manage market research
BSBMKG608A	Develop organisational marketing objectives
BSBMKG609A	Develop a marketing plan

Elective units

Advertising

BSBMKG523A	Design and develop an integrated marketing communication plan

Compliance

BSBCOM603C	Plan and establish compliance management systems

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Diversity

BSBDIV601A Develop and implement diversity policy

Financial management

BSBFIM601A Manage finances

Information management

BSBINM601A Manage knowledge and information

Innovation

BSBINN601B Manage organisational change

Management

BSBMGT605B Provide leadership across the organisation
BSBMGT608C Manage innovation and continuous improvement
BSBMGT616A Develop and implement strategic plans
BSBMGT617A Develop and implement a business plan

Marketing

BSBMKG520A Manage compliance within the marketing legislative framework
BSBMKG605B Evaluate international marketing opportunities
BSBMKG606B Manage international marketing programs
BSBMKG611A Manage measurement of marketing effectiveness

Occupational health and safety

BSBOHS601B Develop a systematic approach to managing OHS

Risk management

BSBRSK501B Manage risk

Sustainability

BSBSUS501A Develop workplace policy and procedures for sustainability

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Imported units

PSPGOV602B	Establish and maintain strategic networks
PSPPROC602B	Direct the management of contracts

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BSB60607 Advanced Diploma of Occupational Health and Safety

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed

Description

Descriptor

This qualification reflects the role of individuals who analyse, design and execute judgements using wide-ranging technical, creative, conceptual or managerial competencies. Their knowledge base may be specialised or broad. These individuals are often accountable for group outcomes.

Job Roles

- Occupational Health and Safety Advisor
- Occupational Health and Safety Auditor
- Occupational Health and Safety Manager
- Occupational Health and Safety Risk Officer
- Occupational Health and Safety Specialist
- Senior Consultant - OHS and Risk Management.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Candidates may enter the qualification through a number of entry points including:

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- BSB51307 Diploma of Occupational Health and Safety or other relevant qualification/s

OR

- with extensive vocational experience in planning, implementing and evaluating their own work and the work of others with safety responsibilities but without formal OHS qualifications.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- OHS Manager
- OHS Practitioner
- Senior OHS Officer.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may choose to undertake studies at higher education level.

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY
Qualification Code and Title The following table contains a summary of the Employability Skills required by industry for this

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• conducting research to collect and analyse information and presenting it in report form • consulting with internal and external stakeholders on evaluation protocols, risk control measures, audit and communication processes • questioning, clarifying and evaluating information • writing in a range of styles to suit different audiences
Teamwork	• delegating roles and responsibilities to team members • providing advice and support to managers and other key personnel • providing feedback, and debriefing staff and external stakeholders post an emergency situation • seeking expert advice and consulting widely on areas such as risk management, occupational health and safety systems
Problem-solving	• calculating resource requirements and acquiring them • collecting and analysing data • comparing and contrasting data • evaluating the effectiveness of systems • identifying hazards, assessing and controlling risk through appropriate control measures • managing risk and developing contingency plans • setting performance indicators for occupational health and safety • solving complex and non-routine difficulties • using a variety of problem-solving and decision making strategies
Initiative and enterprise	• applying improvements to audit and evaluation procedures to ensure quality systems • applying learning about ergonomic activities to develop improved processes • identifying improvements in occupational health and safety management against performance indicators and making recommendations • identifying improvements to work design and organisation • reviewing processes to inform future activity
Planning and organising	• collecting and collating occupational health and safety information and data

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	• conducting formal risk assessments and occupational health and safety audits • designing and developing a systematic approach to occupational health and safety • designing the work environment by matching people, their activities, equipment and systems • designing, monitoring and evaluating risk control strategies • developing and documenting a crisis management plan • identifying and acquiring resources • linking occupational health and safety information and data processes with other functional areas and management systems
Self-management	• knowing and implementing own role in the emergency control organisation • managing own time and priorities, and dealing with contingencies • taking responsibility as required by work role and ensuring all organisational polices and procedures are followed
Learning	• applying learning to develop improved practices • identifying and documenting training needs for the ongoing maintenance of the occupational health and safety system
Technology	• analysing software systems for appropriate formats and specifications • using software to manage records and data, and to develop audit tools and other documentation • using technology to assist the management of information and to assist the planning process • using word processing software and risk analysis tools

Packaging Rules

Total number of units = 8

8 elective units

5 elective units must be selected from the **Group A units** listed below.

The remaining **3 elective units** may be selected from the **Group A** units listed below, or any

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currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from a Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Group A units

BSBOHS601B	Develop a systematic approach to managing OHS
BSBOHS602B	Develop OHS information and data analysis and reporting and recording processes
BSBOHS603B	Analyse and evaluate OHS risk
BSBOHS604B	Apply ergonomic principles to control OHS risk
BSBOHS605B	Apply occupational hygiene principles to control OHS risk
BSBOHS606B	Develop and implement crisis management processes
BSBOHS607B	Advise on application of safe design principles to control OHS risk
BSBOHS608B	Conduct an OHS audit
BSBOHS609B	Evaluate an organisation's OHS performance

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BSB60707 Advanced Diploma of Project Management

Modification History

Not applicable.

Description

Descriptor

This qualification reflects the role of individuals who analyse, design and execute judgements using wide-ranging technical, creative, conceptual or managerial competencies. Their knowledge base may be specialised or broad. These individuals are often accountable for group outcomes.

Job Roles

- Branch/Section Leader - Project Management
- Project Manager
- Project Manager - Construction/Health.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

Candidates may enter the qualification through a number of entry points including:

- BSB51407 Diploma of Project Management or other relevant qualification/s

OR

- with extensive vocational experience in the leadership of projects and teams but without a formal project management qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Project Leader
- Project Management Facilitator
- Project or Program Administrator.

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This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may choose to undertake studies at higher education level.

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
Qualification Code and Title The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• consulting and negotiating contracts as required • consulting with stakeholders and others on managing a range of project plans • developing and managing formal and informal communication networks • developing communication management plans and activities • negotiating solutions to new and emerging issues • producing a wide range of reports, visual presentations and

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	charts to document project progress, milestones and outcomes • utilising excellent interpersonal skills to consult, question, clarify and evaluate information
Teamwork	• assigning responsibilities and supporting project managers • demonstrating high level positive leadership and personnel management • providing feedback while managing delivery environments of projects
Problem-solving	• analysing, coordinating and refining budgets • coordinating conflicting requirements of individual projects • designing control mechanisms for integrated projects • managing human resources requirements using a range of problem-solving and decision making strategies
Initiative and enterprise	• applying learning about ergonomic activities to develop improved processes • identifying improvements to work design and organisation • reviewing processes to inform future activity
Planning and organising	• designing the work environment by matching people, their activities, equipment and systems • managing within a quality management system, the complex interrelationships between projects including scope, risk, resources, time, cost, quality and communication • tracking and monitoring projects
Self-management	• planning own work • selecting and prioritising projects within scope of one's job role • working within organisational policies and procedures, and legislative requirements
Learning	• establishing and implementing systems for ongoing development and training of personnel • passing on to higher authority, lessons learned from integrated project management
Technology	• using a range of software including project management specific programs and databases to analyse information • using electronic communication devices and processes such as internet, intranet, email to produce written correspondence, Gantt charts, schedules and reports • using technology to assist the management of information and to assist the planning process

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Packaging Rules

Packaging Rules	
Total number of units = 9	
9 core units	
Core units	
Project Management	
BSBPMG601A	Direct the integration of projects
BSBPMG602A	Direct the scope of a project program
BSBPMG603A	Direct time management of a project program
BSBPMG604A	Direct cost management of a project program
BSBPMG605A	Direct quality management of a project program
BSBPMG606A	Direct human resources management of a project program
BSBPMG607A	Direct communications management of a project program
BSBPMG608A	Direct risk management of a project program
BSBPMG609A	Direct procurement and contracting for a project program

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BSB60807 Advanced Diploma of Recordkeeping

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07 Business Services Training Package.* Unit codes updated

Description

Descriptor

This qualification reflects the role of individuals with understanding and specialist knowledge of business or records systems, with depth in some areas. They may provide strategic direction for business or records systems in larger organisations with responsibility for a team. They may also be individuals with sole responsibility for business or records systems in smaller organisations.

Job Roles

- Records and Information Consultant
- Records and Information Manager.
-

Pathways Information

Qualification Pathways

Pathways into the qualification

Candidates may enter the qualification through a number of entry points including:

- after achieving the BSB51707 Diploma of Recordkeeping or other relevant qualification/s

OR

- with substantial vocational recordkeeping experience but without a formal qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Records and Information Coordinator

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- Records and Information Supervisor
- Records and Information Team Leader.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may choose to undertake qualifications at a higher education level.

Licensing/Regulatory Information

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

There are no entry requirements for this qualification.

Employability Skills Summary

The following table contains a summary of the Employability Skills required by industry for this qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.

Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• interpreting customer needs • negotiating with internal and external stakeholders • utilising excellent interpersonal skills and producing a wide range of reports and making presentations as required
Teamwork	• briefing various personnel on their roles and responsibilities regarding the implementation of business or records systems • defining performance measures and working collaboratively with team members • identifying performance gaps and taking remedial action for under-performance
Problem-solving	• developing records frameworks, policies and procedures to assist organisational members in addressing recordkeeping needs

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	• developing strategies to support the design and implementation of business or records systems
Initiative and enterprise	• addressing new and changing circumstances to ensure systems take advantage of latest practices and technologies • identifying new and emerging opportunities to assist organisation in maximising the advantages provided by business or records systems
Planning and organising	• developing staff key performance indicators to monitor performance and using them in relation to business or records systems
Self-management	• applying discretion and judgement within complex environments • managing own time and performance • using judgement in planning, selecting and allocating resources • working within organisational policies and procedures and legislative requirements
Learning	• coaching and mentoring others to acquire new knowledge and skills • providing learning and development opportunities
Technology	• creating presentations using a range of media • using technology to assist with the management of information and to assist the planning process

Packaging Rules

Total number of units = 8

8 elective units

5 elective units must be selected from the **Group A units** listed below.

The remaining **3 elective units** may be selected from the **Group A** or **Group B** units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 unit** may be selected from a Diploma qualification.

Elective units must be relevant to the work outcomes, local industry requirements and the qualification level.

Elective Units

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Group A units

Recordkeeping

BSBRKG601B	Define recordkeeping framework
BSBRKG603B	Prepare a functional analysis for an organisation
BSBRKG604B	Determine security and access rules and procedures
BSBRKG605B	Determine records requirements to document a function
BSBRKG606B	Design a records retention and disposal schedule
BSBRKG607B	Document and monitor the record-creating context
BSBRKG608B	Plan management of records over time

Group B units

Compliance

BSBCOM603C	Plan and establish compliance management systems

Diversity

BSBDIV601A	Develop and implement diversity policy

Information Management

BSBINM601A	Manage knowledge and information

Innovation

BSBINN502A	Build and sustain an innovative work environment
BSBINN601B	Manage organisational change

Financial Management

BSBFIM601A	Manage finances

Management

BSBMGT605B	Provide leadership across the organisation
BSBMGT608C	Manage innovation and continuous improvement
BSBMGT615A	Contribute to organisation development
BSBMGT616A	Develop and implement strategic plans
BSBMGT617A	Develop and implement a business plan

Occupational Health and Safety

BSBOHS601B	Develop a systematic approach to managing OHS

Risk Management

BSBRSK501B	Manage risk

Sustainability

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BSBSUS501A Develop workplace policy and procedures for sustainability

Imported Units

PSPGOV602B	Establish and maintain strategic networks
PSPPROC602B	Direct the management of contracts

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BSB60907 Advanced Diploma of Management (Human Resources)

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. • Outdated advice removed • Unit codes updated

Description

Descriptor

This qualification reflects the role of individuals who provide leadership and strategic direction in the human resources activities of an organisation. They analyse, design and execute judgements using wide-ranging technical, creative, conceptual or managerial competencies. Their knowledge base may be highly specialised or broad within the human resources field. These individuals are often accountable for group outcomes and for the overall performance of the human resources function of an organisation.

Job Roles

- Human Resources Director
- Human Resources Strategist
- National, Regional or Global Human Resources Manager.
-

Pathways Information

Qualification Pathways

Entry requirements

There are no entry requirements for this qualification.

Pathways into the qualification

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Candidates may enter the qualification through a number of entry points including:

- BSB50607 Diploma of Human Resources Management or other relevant qualification/s

OR

- with substantial vocational experience in human resources management but without a formal qualification.

Examples of indicative job roles for candidates seeking entry based upon their vocational experience include:

- Human Resources Advisor
- Human Resources and Change Manager
- Human Resources Consultant
- Human Resources Manager
- Senior Human Resources Officer.

This breadth of expertise would equate to the competencies required to undertake this qualification.

Pathways from the qualification

After achieving this qualification candidates may choose to undertake qualifications at a higher education level.

Licensing/Regulatory Information

Licensing, **Legislative**, **Regulatory or Certification Considerations**

There is no direct link between this qualification and licensing, legislative and/or regulatory requirements. However, where required, a unit of competency will specify relevant licensing, legislative and/or regulatory requirements that impact on the unit.

Entry Requirements

Not applicable.

Employability Skills Summary

EMPLOYABILITY SKILLS QUALIFICATION SUMMARY
The following table contains a summary of the Employability Skills required by industry for this

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
qualification. The Employability Skills facets described here are broad industry requirements that may vary depending on qualification packaging options.	
Employability Skill	**Industry/enterprise requirements for this qualification include**:
Communication	• consulting, questioning, clarifying and evaluating information • interpreting customer needs • negotiating budgets and plans and then re-developing as required to meet organisational needs • negotiating with internal and external stakeholders • utilising excellent interpersonal skills, and producing a wide range of reports and making presentations as required
Teamwork	• briefing various personnel on their roles and responsibilities regarding the implementation of the marketing plan • coordinating resources and developing systems to manage team and individual performance • defining performance measures and working collaboratively with team members • identifying performance gaps and taking remedial action for underperformance
Problem-solving	• collecting and analysing data • comparing and contrasting data • conducting situational analyses • developing and managing risk and contingency plans • developing strategies for improvement • performing cost benefit analyses, budgeting, assessing and managing risk
Initiative and enterprise	• evaluating and improving market performance • identifying strengths and opportunities within organisation's projected capabilities and resources
Planning and organising	• managing human resources strategic planning • collecting, collating and analysing information using appropriate workplace business systems • developing customer acquisition and retention strategies • developing systems that are flexible and responsive to changing circumstances • evaluating processes and making changes as required • planning and managing resource acquisition and deployment within budgetary constraints • planning for contingencies
Self-management	• applying discretion and judgement within complex environments

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EMPLOYABILITY SKILLS QUALIFICATION SUMMARY	
	• managing own time and performance • using judgement in planning and in selecting and allocating resources • working within organisational policies and procedures and legislative requirements
Learning	• coaching and mentoring others to acquire new knowledge and skills • providing learning and development opportunities
Technology	• creating presentations using a range of media • using computerised systems, software and telecommunication devices • using technology to assist with the management of information and to assist the planning process • using technology to record and generate ideas

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Packaging Rules

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Total number of units = 8

6 core units plus

2 elective units

The **2 elective units** may be selected from the elective units listed below, or any currently endorsed Training Package or accredited course at the same qualification level. If not listed below, **1 elective unit** may be selected from a Diploma qualification.

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Core units

Diversity

BSBDIV601A Develop and implement diversity policy

Human Resource Management

BSBHRM602B Manage human resources strategic planning

Innovation

BSBINN601B Manage organisational change

Management

BSBMGT605B Provide leadership across the organisation

BSBMGT615A Contribute to organisation development

BSBMGT616A Develop and implement strategic plans

Elective units

Compliance

BSBCOM603C Plan and establish compliance management systems

Financial Management

BSBFIM601A Manage finances

Information Management

BSBINM601A Manage knowledge and information

Management

BSBMGT608C Manage innovation and continuous improvement

BSBMGT617A Develop and implement a business plan

Marketing

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BSBMKG609A Develop a marketing plan

Occupational Health and Safety

BSBOHS601B Develop a systematic approach to managing OHS

Recordkeeping

BSBRKG601B Define recordkeeping framework

Risk Management

BSBRSK501B Manage risk

Sustainability

BSBSUS501A Develop workplace policy and procedures for sustainability

Imported Units

PSPGOV602B Establish and maintain strategic networks

PSPPROC602B Direct the management of contracts

•

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BSBSS00001 Aspiring Supervisor Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	Units from this skill set can contribute to BSB30110 Certificate III in Business.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBFLM303C	Contribute to effective workplace relationships
	BSBFLM305C	Support operational plan
	BSBFLM306C	Provide workplace information and resourcing plans
	BSBFLM312C	Contribute to team effectiveness

Target Group

Target Group	This skill set is for staff who plan to move into supervisory or team leader roles.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These units of competency from BSB07 Business Services Training Package meet the industry requirements for people with supervisory or managerial aspirations.

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BSBSS00002 Basic Contact Centre Operations Skill Set

Modification History

Release	Comments
Release 2	New release of this Skill Set released with *version 6 of BSB07* Business *Services Training Package*. Updated unit code.

Description

Not applicable.

Pathways Information

These units of competency provide credit towards a range of qualifications, including:

BSB20207 Certificate II in Customer Contact

BSB30207 Certificate III in Customer Contact

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

BSBOHS201A	Participate in OHS processes
BSBCCO205A	Prepare for work in a customer contact environment
BSBCCO203A	Conduct customer contact
BSBITU101A	Operate a personal computer

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Target Group

This Skill Set is designed for persons who are seeking to enter the industry and require basic operator skills or are working in a contact centre and require recognition of their current skills.

Suggested words for Statement of Attainment

These units of competency from the BSB07 Business Services Training Package meet basic competency requirements for operators in a contact centre.

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BSBSS00003 Copyright Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	Units from within this Skill Set can contribute to a number of qualifications, including the BSB40207 Certificate IV in Business, BSB50207 Diploma of Business, BSB50507 Diploma of Franchising and BSB51107 Diploma of Management.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBIPR401A	Use and respect copyright
	BSBIPR501A	Manage intellectual property to protect and grow business

Target Group

Target Group	This skill set is for people who need to manage the protection and commercialisation of original works within an organisation.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These competencies from the BSB07 Business Services Training Package meet the industry requirements for the management of the protection and use of original works within an organisation.

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BSBSS00004 Design Fundamentals Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	These units of competency provide credit towards a broad range of qualifications in multiple industry and community contexts

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBDES202A	Evaluate the nature of design in a specific industry context
	BSBCRT101A	Apply critical thinking techniques
	BSBDES201A	Follow a design process

Target Group

Target Group	This Skill Set is for individuals working in any industry context who need to develop and apply an appreciation of the design process in improving individual work processes and practices. Good design processes include the application of critical thinking to a range of situations and challenges including product and service requirements arising from particular business or community needs.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These units of competency from the BSB07 Business Services Training Package meet broad industry and community requirements for the development and application of basic design fundamental skills.

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BSBSS00005 Design Protection Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	Units from within this Skill Set can contribute to a number of qualifications, including the BSB40207 Certificate IV in Business, BSB50207 Diploma of Business, BSB50507 Diploma of Franchising and BSB51107 Diploma of Management.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBIPR404A	Protect and use innovative designs
	BSBIPR501A	Manage intellectual property to protect and grow business

Target Group

Target Group	This skill set is for people who need to manage the protection and commercialisation of innovative designs within an organisation.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These competencies from the BSB07 Business Services Training Package meet the industry requirements for the management of the protection and use of innovative designs within an organisation.

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BSBSS00006 Franchising Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	These units provide credit towards a number of qualifications, including the BSB50507 Diploma of Franchising.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBFRA502B	Manage a franchise operation
	BSBFRA504B	Manage relationships with franchisees
	BSBFRA505B	Manage closure of a franchise

Target Group

Target Group	This skill set is for consultants assisting people to buy into a franchise or to franchise their own business operation.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These competencies from the BSB07 Business Services Training Package meet the industry requirements for providing consultancy services to franchisors and franchisees.

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BSBSS00007 Governance Induction Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	These units provide credit towards the BSB40907 Certificate IV in Governance.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBGOV401A	Implement Board member responsibilities
	BSBGOV402A	Work within organisational structure
	BSBGOV403A	Analyse financial reports and budgets

Target Group

Target Group	This skill set is for individuals who are new to positions on a Board of governance.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These competencies from the BSB07 Business Services Training Package meet the industry requirements for new Board members.

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BSBSS00008 Innovation Leadership Skill Set

Modification History

Version	Comments
Release 1	This Skill Set first released with BSB07 Business Services Training Package version 6

Description

This skill set is for individuals who will have a leadership role in promoting innovation within the whole organisation or within a division.

Pathways Information

The units provide credit towards a range of qualifications, including BSB40207 Certificate IV in Business, BSB50207 Diploma of Business and BSB40407 Certificate IV in Small Business management.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

- BSBINN501A Establish systems that support innovation
- BSBINN502A Build and sustain an innovative work environment
- SIRXQUA002A Lead a team to foster innovation
-

Target Group

Someone who has a leadership role in an organisation and may include (but not limited to) a Manager of Research, Product Development, or a Divisional Manager.

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Suggested words for Statement of Attainment

These units of competency from BSB07 Business Services Training Package meet the industry requirements for individuals who lead innovation at all levels of the workforce.

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BSBSS00009 Innovation Practice Skill Set

Modification History

Release	Comments
Release 1	This Skill Set first released with BSB07 Business Services Training Package version 6

Description

This Skill Set is for individuals who make a substantial contribution and have a level of ownership of innovation within an organisation.

Pathways Information

The units provide credit towards a range of qualifications in BSB07, including BSB30307 Certificate III in Micro Business Operations.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

- BSBCRT402A Collaborate in a creative process
- BSBCRT501A Originate and develop concepts
-

Target Group

Existing workers who have contributed to and helped to implement an innovation system within an organisation.

Suggested words for Statement of Attainment

These units of competency from BSB07 Business Services Training Package meet the industry requirements for individuals who contribute to an innovative workplace.

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BSBSS00010 Intellectual Property Strategic Management Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	Units from within this Skill Set can contribute to a number of qualifications, including the BSB50207 Diploma of Business, BSB50507 Diploma of Franchising, BSB51107 Diploma of Management, BSB60207 Advanced Diploma of Business, and BSB60407 Advanced Diploma of Management.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBIPR501A	Manage intellectual property to protect and grow business
	BSBIPR601A	Develop and implement strategies for intellectual property management

Target Group

Target Group	This skill set is for managers who need to develop strategies for the management and commercialisation of intellectual property.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These competencies from the BSB07 Business Services Training Package meet the industry requirements for developing and managing intellectual property strategies.

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BSBSS00011 Key Management Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	These units provide credit towards a number of qualifications including the BSB40807 Certificate IV in Frontline Management.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBMGT401A	Show leadership in the workplace
	BSBMGT402A	Implement operational plan
	BSBWOR402A	Promote team effectiveness

Target Group

Target Group	This skill set is for people newly promoted to the position of supervisor, leading hand or team leader.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These competencies from the BSB07 Business Services Training Package meet the industry requirements for a supervisor.

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BSBSS00012 Key Recordkeeping Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	These units provide credit towards the BSB30807 Certificate III in Recordkeeping.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBRKG305A	Review recordkeeping functions
	BSBRKG301B	Control records
	BSBRKG302B	Undertake disposal

Target Group

Target Group	This skill set is for individuals who have operational responsibilities with regards to records and/or recordkeeping systems.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These competencies from the BSB07 Business Services Training Package meet the industry requirements for recordkeeping at an operational level within an organisation.

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BSBSS00013 Legal Transcription Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	These units provide credit towards a number of qualifications including the BSB40207 Certificate IV in Business and the BSB40507 Certificate IV in Business Administration.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBADM411A	Produce complex texts from audio transcription
	BSBITU307A	Develop keyboarding speed and accuracy
	BSBLEG305A	Use legal terminology in order to carry out tasks
	BSBRES401A	Analyse and present research information
	BSBWRT401A	Write complex documents

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Target Group

Target Group	This skill set is for individuals providing transcription services to the legal industry.

Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These competencies from the BSB07 Business Services Training Package meet the industry requirements for a legal transcription typist.

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BSBSS00014 Managing Innovation Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	Units from this skill set can contribute to a number of qualifications, including BSB40207 Certificate IV in Business, BSB50207 Diploma of Business, and BSB51107 Diploma of Management.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBINN502A	Build and sustain an innovative work environment
	BSBINN501A	Establish systems that support innovation
	BSBIPR402A	Protect and use new inventions and innovations

Target Group

Target Group	This skill set is for individuals whose role includes fostering innovation at all levels of the workforce.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These units of competency from BSB07 Business Services Training Package meet the industry requirements for fostering innovation at all levels of the workforce.

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BSBSS00015 Medical Transcription Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	These units provide credit towards a number of qualifications including, the BSB40207 Certificate IV in Business and the BSB40507 Certificate IV in Business Administration.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBADM411A	Produce complex texts from audio transcription
	BSBITU307A	Develop keyboarding speed and accuracy
	BSBMED301B	Interpret and apply medical terminology appropriately
	BSBRES401A	Analyse and present research information
	BSBWRT401A	Write complex documents

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Target Group

Target Group	This skill set is for individuals providing transcription services to the medical industry.

Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These competencies from the BSB07 Business Services Training Package meet the industry requirements for a medical transcription typist.

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BSBSS00016 Patent Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	Units from within this Skill Set can contribute to a number of qualifications, including the BSB40207 Certificate IV in Business, BSB50207 Diploma of Business, BSB50507 Diploma of Franchising and BSB51107 Diploma of Management.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBIPR402A	Protect and use new inventions and innovations
	BSBIPR501A	Manage intellectual property to protect and grow business

Target Group

Target Group	This skill set is for people who need to manage the protection and commercialisation of inventions and innovations within an organisation.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These competencies from the BSB07 Business Services Training Package meet the industry requirements for the management of the protection and use of inventions and innovations within an organisation.

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BSBSS00017 Small Business Contracting Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	The BSB units of competency provide credit towards the BSB40407 Certificate IV in Small Business Management.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBSMB401A	Establish legal and risk management requirements of small business
	BSBSMB402A	Plan small business finances
	PSPGOV407B	Provide a quotation

Target Group

Target Group	This skill set is for small business practitioners who are pursuing contracted business opportunities. It may relate to people who operate a small business on a day-to-day basis either as an owner-operator or as an employed operator/manager.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These units of competency meet the industry requirements for conducting business via contracted activity.

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BSBSS00018 Small Business Financial Management Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	BSBSMB304A Determine resource requirements for the micro business provides credit towards the BSB30307 Certificate III in Micro Business Operations. BSBSMB402A Plan small business finances provides credit towards the BSB40407 Certificate IV in Small Business Management.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBSMB304A	Determine resource requirements for the micro business
	BSBSMB402A	Plan small business finances
	BSBSMB406A	Manage small business finances

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Target Group

Target Group	This skill set is for small business practitioners who are managing finances for a small business. It may relate to people who are establishing or operating a micro business providing for self employment.

Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These units of competency meet the industry requirements for financial management.

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BSBSS00019 Small Business Home Based Business Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	These units of competency provide credit towards the BSB30307 Certificate III in Micro Business Operations.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBSMB304A	Determine resource requirements for the micro business
	BSBSMB306A	Plan a home based business
	BSBSMB307A	Set up information and communications technology for the micro business

Target Group

Target Group	This skill set is for people who are establishing or operating a micro business providing for self employment.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These units of competency meet the industry requirements for establishing or operating a home-based micro business.

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BSBSS00020 Small Business Indigenous Corporate Governance Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	BSBATSIM416A Oversee organisational planning provides credit towards the BSB41910 Certificate IV in Business (Governance). BSBGOV401A Implement Board member responsibilities and BSBGOV402A Work within organisational structure provide credit towards the BSB40907 Certificate IV in Governance.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBATSIM416A	Oversee organisational planning
	BSBGOV401A	Implement Board member responsibilities
	BSBGOV402A	Work within organisational structure

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Target Group

Target Group	This skill set is for small business practitioners who are involved in Indigenous corporate governance. It may relate to people who manage a small business on a day-to-day basis for Indigenous organisations.

Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These units of competency meet the industry requirements for providing corporate governance advice within Indigenous organisations.

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BSBSS00021 Small Business Intellectual Property Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	Units from within this Skill Set can contribute to a number of qualifications, including BSB30307 Certificate III in Micro Business Operations, BSB40207 Certificate IV in Business, BSB40407 Certificate IV in Small Business Management and BSB40707 Certificate IV Franchising.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBIPR405A	Protect and use intangible assets in small business
	BSBCRT501A	Originate and develop concepts

Target Group

Target Group	This skill set is for people who need to manage the protection and commercialisation of intellectual property in small business.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These competencies from the BSB07 Business Services Training Package meet the industry requirements for the protection of intellectual property in small business.

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BSBSS00022 Small Business Marketing Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	BSBSMB301A Investigate micro business opportunities provides credit towards the BSB30307 Certificate III in Micro Business Operations. BSBMKG414B Undertake marketing activities and BSBSMB403A Market the small business provide credit towards the BSB40407 Certificate IV in Small Business Management. BSBMKG401B Profile the market and BSBMKG402B Analyse consumer behavior for specific markets provide credit towards the BSB41307 Certificate IV in Marketing.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBMKG401B	Profile the market
	BSBMKG402B	Analyse consumer behaviour for specific markets
	BSBMKG414B	Undertake marketing activities
	BSBSMB403A	Market the small business
	BSBSMB301A	Investigate micro business opportunities

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Target Group

Target Group	This skill set is for small business practitioners who are conducting marketing activities. It may relate to people who operate a small business on a day-to-day basis either as an owner-operator or as an employed operator/manager.

Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These units of competency meet the industry requirements for conducting marketing activities for a small business.

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BSBSS00023 Small Business Operations Preparatory Skill Set

Modification History

Release	Comments
Release 2	New release of this Skill Set released with *version 6 of BSB07* Business *Services Training Package*. Updated code of unit.

Description

Not applicable.

Pathways Information

BSBIND201A Work effectively in a business environment provides credit towards the BSB10107 Certificate I in Business.

BSBWOR204A Use business technology provides credit towards the BSB20107 Certificate II in Business.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

BSBIND201A	Work effectively in a business environment
BSBSMB201A	Identify suitability for micro business
BSBWOR204A	Use business technology
FNSFLT203A	Develop understanding of debt and

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BSBIND201A	Work effectively in a business environment
	consumer credit

Target Group

This skill set is for people who are assisting with small business operations or are intending to start a small business. It may relate to people working in a micro/small business or to people examining the potential for establishing a micro business.

Suggested words for Statement of Attainment

These units of competency meet the industry requirements for providing assistance with the management of a small business.

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BSBSS00024 Small Business Preparatory Skill Set

Modification History

Release	Comments
Release 2	New release of this SKill Set released with *version 6 of BSB07* Business *Services Training Package*. Updated unit code

Description

Not applicable.

Pathways Information

The BSB units of competency provide credit towards the BSB10107 Certificate I in Business.

FNSFLT201A Develop and use a personal budget provides credit towards the BSB30307 Certificate III in Micro Business Operations.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

BSBADM101A	Use business equipment and resources
BSBITU101A	Operate a personal computer
FNSFLT201A	Develop and use a personal budget

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Target Group

This skill set is for people preparing for work in a micro/small business.

Suggested words for Statement of Attainment

These units of competency meet the industry requirements for providing preparatory work in small business management.

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BSBSS00025 Trade Mark Skill Set

Modification History

Not applicable.

Description

Not applicable.

Pathways Information

Pathway	Units from within this Skill Set can contribute to a number of qualifications, including the BSB40207 Certificate IV in Business, BSB50207 Diploma of Business, BSB50507 Diploma of Franchising and BSB51107 Diploma of Management.

Licensing/Regulatory Information

Not applicable.

Skill Set Requirements

Units	BSBIPR403A	Protect and use brands and business identity
	BSBIPR501A	Manage intellectual property to protect and grow business

Target Group

Target Group	This skill set is for people who need to manage the protection and commercialisation of brands and business identity within an organisation.

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Suggested words for Statement of Attainment

Suggested form of words for Statement of Attainment	These competencies from the BSB07 Business Services Training Package meet the industry requirements for the management of the protection and use of brands and business identity within an organisation.

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BSBADM101A Use business equipment and resources

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to choose equipment and resources to complete a variety of tasks under direct supervision and includes operating equipment, undertaking routine maintenance and reporting faults to the appropriate person. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals developing basic skills and knowledge to use a variety of business equipment in preparation for working in a broad range of settings.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Select equipment or resources	1.1. Identify and access ***business equipment*** or ***resources*** required to complete task under direct instructions 1.2. Estimate quantities and resources correctly to complete the task 1.3. Check equipment for serviceability in accordance with ***equipment instructions***
2. Operate equipment	2.1. Operate equipment in accordance with manufacturer's specifications and under direct instructions 2.2. Identify equipment faults accurately and take action to ensure equipment is repaired in accordance with manufacturer's specifications 2.3. Report repairs outside area of own responsibility to ***appropriate persons***
3. Maintain equipment or resources	3.1. Maintain equipment or resources to support completion of tasks under direct instructions 3.2. Undertake ***maintenance*** to ensure equipment meets manufacturer's specifications 3.3. Maintain ***records*** concerning equipment or resources under direct instructions 3.4. Store equipment and resources under direct instructions

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to identify work requirements and to process basic, relevant workplace documentation • communication skills to identify lines of communication, to request advice, to effectively question, to follow instructions, to receive feedback and to report equipment faults • problem-solving skills to solve routine problems related to business equipment and to determine appropriate fault repair actions while under direct supervision • technology skills to use business equipment under direct supervision.
Required knowledge
• key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as: • occupational health and safety (OHS) • functions of a range of business equipment • correct shut-down procedures for a range of business equipment • common equipment faults • routine maintenance procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated application of appropriate maintenance procedures. • knowledge of the functions of a range of business equipment • operation of a range of business equipment.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of operational and maintenance manual and records.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • observation of demonstrated techniques in operating and maintaining business equipment • oral or written questioning to asses knowledge of the operation and maintenance of business equipment • review of records concerning equipment or resources.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Business equipment may include:	• answering machine • binder • fax machine • photocopier • printer

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RANGE STATEMENT	
	• telephone
Resources may include:	• equipment • facilities • human resources • OHS resources • stock and supplies
Equipment instructions may include:	• manufacturers guidelines • OHS guidelines and procedures • procedures manual • training notes
Appropriate persons may include:	• colleagues • external organisations • line management • supervisor
Maintenance may include:	• adding toner • cleaning equipment regularly • clearing paper jams • organising service calls • replacing paper
Records may include:	• equipment service call forms • purchase orders • service repair forms • warranties

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - General Administration

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Co-requisite units

Co-requisite units		

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BSBADM301B Produce texts from shorthand notes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to take shorthand from a dictation source at 60 words (or more) per minute, in accordance with the current Australian Standard for shorthand speed, and to produce an accurate text from the notes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who produce notes and texts from oral or printed sources using shorthand techniques. They may work as individuals providing administrative support within an enterprise, or they may be responsible for the production of their own notes and other documentation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Take dictation using shorthand	1.1. Prior to commencing the task, identify organisational and task requirements relating to style, presentation and storage of documents 1.2. Clarify ***purpose*** and ***requirements*** of text with the author/speaker 1.3. Record shorthand notes from a ***dictation source*** at a minimum speed of 60 words per minute 1.4. Clarify meaning and spelling of unusual names or terms to ensure accuracy of the notes 1.5. ***Self-check*** shorthand notes for ***accuracy***
2. Transcribe shorthand notes	2.1. Produce text from shorthand notes to at least 98% accuracy 2.2. Produce text within ***designated time lines***
3. Edit and revise text	3.1. Self-check final text for accuracy, spelling, grammar, punctuation and formatting 3.2. Revise, format, print, name and store text in accordance with organisational and task requirements

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication skills to to predict words from context, and to interpret intonation and stress
• literacy skills to:
  • read and understand organisational procedures
  • produce a range of documents
  • proofread and edit work for accuracy against original
• memory retention skills to accurately capture information
• problem-solving skills to address inconsistencies or errors in text.

Required knowledge

• formatting styles and their effect on formatting, readability and appearance of documents
• key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • occupational health and safety
• organisational requirements for ergonomics, work periods and breaks, and conservation techniques
• organisational style guide
• shorthand symbols.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and	Evidence of the following is essential:

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EVIDENCE GUIDE	
evidence required to demonstrate competency in this unit	• producing accurate documents from notes that meet the requirements of the author/speaker • accurate transcription of data.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to shorthand manuals • access to English and shorthand dictionaries • access to examples of audio sources for transcription and note taking.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • demonstration of techniques in a workplace or simulated environment.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBADM302B Produce texts from notes • BSBWRT301A Write simple documents • other general administration units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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RANGE STATEMENT	
Purpose may include:	• agenda • formal or informal letters • memo • report
Requirements may include:	• verbatim motions plus meeting summary i.e. minutes • verbatim record of dictation • verbatim record of meeting
Dictation source may include:	• in person • teleconference • telephone • videoconference
Self-checking notes for accuracy may include:	• checking correlation between source and notes • clarifying names, addresses and specific spelling with information on file • correct grammar • correct spelling • correct use of technical vocabulary • inserting paragraphs • inserting punctuation • intended meaning • reading over shorthand notes for meaning
Required degree of speed and ***accuracy*** may include:	• AS 2907:2001 Shorthand speed tests • 60 words per minute at 98% accuracy
Designated time lines may include:	• organisational time line e.g. minutes of meeting/agenda • AS 2907:2001 Shorthand speed tests • time line agreed with supervisor/person requiring text

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Administration - General Administration

Co-requisite units

Co-requisite units		

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BSBADM302B Produce texts from notes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to take notes from oral or printed sources to produce accurate text. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who produce notes and texts from oral or printed sources. They may work as individuals providing administrative support within an enterprise, or they may be responsible for the production of their own notes and other documentation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Take notes	1.1. Prior to commencing the task, identify organisational requirements relating to style, presentation and storage of documents 1.2. Clarify ***purpose*** and ***requirements*** of text with author/speaker 1.3. ***Record notes with the required degree of accuracy*** from ***appropriate sources*** 1.4. Clarify meaning and spelling of names or technical terms to ensure accuracy of the notes 1.5. ***Self-check notes*** for accuracy
2. Transcribe notes	2.1. ***Produce text from notes to the required degree of accuracy*** and to reflect the meaning intended by the author/speaker 2.2. Produce text within ***designated time lines***
3. Edit and revise text	3.1. ***Self-check final text*** for accuracy and grammar, and ensure syntax is appropriate for the intended purpose and audience of the text 3.2. Revise, format, name, store and print text in accordance with ***organisational and task requirements***

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication skills to clarify requirements of documents
• literacy skills to:
  • read and understand organisational procedures
  • produce a range of documents
  • proofread and edit work for accuracy against original
• problem-solving skills to address inconsistencies or errors in text
• memory retention skills to accurately capture information.

Required knowledge

• formatting styles and their effect on formatting, readability and appearance of documents
• key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • occupational health and safety
• organisational requirements for ergonomics, work periods and breaks, and conservation techniques
• organisational style guide.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • producing accurate documents from notes that meet the requirements of the author/speaker

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EVIDENCE GUIDE	
	• using a range of note taking techniques and methods.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of audio sources for transcription and note taking.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • demonstration of techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBWRT301A Write simple documents • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Purpose may include:	• agendas • formal or informal letters • meeting notes • memos • reports

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RANGE STATEMENT	
Requirements may include:	• summary motions plus meeting summary i.e. minutes • summary record of meetings • summary of verbal instructions
Recording notes with the required degree of accuracy may include:	• capturing intended meaning of dictation • complete record
Appropriate sources may include:	• at meetings • by telephone • dictation • for multiple speakers • from audio-tapes • from printed matter • in person • those taken • via teleconference • via videoconference
Self-checking notes may include:	• checking correlation between source and notes • clarifying names, addresses and specific spelling with information on file • inserting punctuation • reading over notes for meaning
Producing text from notes to the required degree of accuracy may include:	• correct grammar • correct spelling • correct use of technical vocabulary • intended meaning
Designated time lines for production of text may include:	• organisational time line e.g. agenda or minutes of meeting • time line agreed with supervisor or person requiring text
Self-checking final text may include:	• checking grammar • checking intended meaning • checking spelling
Organisational and task requirements may include:	• author/speaker instructions • number of copies • organisational format

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - General Administration

Co-requisite units

Co-requisite units		

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BSBADM303B Produce texts from audio transcription

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to transcribe from an audio source using keyboarding techniques and to produce accurate texts. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who produce texts from audio sources using keyboarding techniques. They may work as individuals who provide administrative support within an enterprise and may be responsible for their own output.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare for audio transcription	1.1. Prior to commencing the task, identify organisational requirements relating to style, presentation and storage of texts 1.2. Clarify ***purpose and requirements of the text*** with author or supervisor
2. Transcribe from an audio source	2.1. Produce text using keyboarding techniques from an ***audio transcription*** with the ***required accuracy*** 2.2. Predict the meaning of any unclear speech from the context, or clarify with authors 2.3. Ensure text developed from the audio transcription conveys intended meaning 2.4. Clarify the spelling of names or any technical terms and punctuation to ensure accuracy and clarity of the text 2.5. Produce draft text within ***designated time lines*** 2.6. ***Self-check*** draft text for accuracy
3. Edit and revise text	3.1. Circulate draft for checking in line with requirements of the organisation or originator of the audio transcription 3.2. Incorporate any amendments and self-check final text for accuracy, grammar and appropriateness for intended purpose and audience 3.3. Format, name, store, print and distribute final text in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with ***organisational and task requirements***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to clarify intended meaning, to predict words from context, and to interpret intonation and stress
- listening skills to identify different speakers from their voices
- literacy skills to:
  - read and understand organisational procedures
  - produce a range of documents
  - proofread and edit work for accuracy against original.

Required knowledge

- key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety
- formats and styles of workplace documents
- organisational policy and procedures requirements
- types of audio transcriptions.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • producing accurate final documents transcribed from audio sources.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources, such as: • workplace reference materials such as style guides • audio source equipment such as hand held devices, tape recorders and audio-tapes, dictaphone equipment • computer equipment including word processing software • dictionary.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • demonstration of techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBWRT301AWrite simple documents • other administration units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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RANGE STATEMENT	
Purpose and requirements of the text may include:	• agenda • formal or informal letters • memo • minutes • report • verbatim record of dictation • verbatim record of meeting
Audio transcription may include:	• electronic audio files, for example MP3 files, podcasts, hand held device including personal digital assistants (PDAs) • audio-tape • dictation machine or dictaphone • micro-cassette
Required accuracy may include:	• capturing the intended meaning of the dictation • correct grammar • correct spelling • correct use of technical vocabulary • intended meaning
Designated time lines may include:	• organisational time line e.g. minutes of meeting or agenda • time line agreed with supervisor or the person requiring text
Self-checking may include:	• checking and incorporating any amendments suggested by others • checking for readability and flow • checking grammar • checking that the intended meaning is captured • checking spelling
Organisational and task requirements may include:	• instructions of the author of the audio transcription, or supervisor • organisational policies and procedures • filing and recordkeeping conventions • correct number of copies • organisational format or style guide

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - General Administration

Co-requisite units

Co-requisite units		

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BSBADM307B Organise schedules

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage appointments and diaries for personnel within an organisation, using manual and electronic diaries, schedules and other appointment systems. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who provide administrative support to teams and individuals in the management of diaries, schedules and other appointment mechanisms.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish schedule requirements	1.1. Identify ***organisational requirements*** and protocols for diaries and staff ***planning tools*** 1.2. Identify organisational procedures for different types of appointments 1.3. Determine personal requirements for ***diary and schedule items*** for individual personnel 1.4. Establish appointment priorities and clarify in discussion with individual personnel
2. Manage schedules	2.1. Identify ***recurring appointments*** and deadlines, and schedule these in accordance with individual and organisational requirements 2.2. Establish availability of attendees, and schedule new appointments in accordance with required time lines and diary commitments 2.3. Negotiate ***alternative arrangements*** and confirm when established appointments are changed 2.4. ***Record appointments*** and manage schedules in accordance with ***organisational policy and procedures***

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to discuss and confirm requirements and priorities of others and to question others to clarify information • literacy skills to read a range of procedural texts and to write simple instructions • negotiation skills to schedule appointments where there are competing demands • numeracy skills to estimate time, plan accurately and keep records • problem-solving skills to negotiate task distribution and timing for appointments with other members of the group • time management skills to allow realistic time lines to schedule appointments.
Required knowledge
• key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as: • anti-discrimination legislation • ethical principles • codes of practice • privacy laws • occupational health and safety (OHS) • relationship between satisfactorily organising another person's schedule and achieving team goals • responsibility that is involved in making arrangements for others.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • maintaining schedules which meet individual and organisational needs • prioritising and negotiating competing demands.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to a range of diaries, planners and calendars to record and schedule appointments.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • analysis of responses to case studies and scenarios • demonstration of techniques in a workplace or simulated environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Organisational requirements may include:	• availability of information • electronic linked diaries and schedules • linking personal and executive diaries • priority clients and personnel • protocols in contacting other personnel within

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RANGE STATEMENT	
	and outside organisation • recording systems
Planning tools may include:	• appointment book • appointment view and planner view in electronic scheduling systems • calendar • desk diary • electronic calendar or diary • in/out boards and whiteboards • manual planners • planning wall chart
Diary and schedule items may include:	• conferences • deadlines • leave (for both immediate person and others whose absence affects the person) • meetings • recurring appointments • teleconferences • travel
Recurring appointments may include:	• board meetings • committee meetings • staff meetings
Alternative arrangements may include:	• cancelling pre-arranged appointments • inserting additional appointments after a schedule has been prepared • re-scheduling existing appointments
Appointments may be recorded in:	• calendar • diary • electronic system • filing system • paper system
Organisational policy and procedures may include:	• adequate time between appointments • leave • limit on total appointments in any one day • lunch breaks • OHS issues • stress minimisation • sufficient time to complete projects and to meet deadlines • time off in lieu

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - General Administration

Co-requisite units

Co-requisite units		

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BSBADM311A Maintain business resources

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to determine, administer and maintain resources and equipment to complete a variety of tasks. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge of business resources and their maintenance to provide technical advice and support to a team.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Advise on resource requirements	1.1. Calculate estimates of future and present ***business resource needs*** in accordance with ***organisational requirements*** 1.2. Ensure advice is clear, concise and relevant to achievement of organisational requirements 1.3. Provide information on the most economical and effective choice of equipment, materials and suppliers 1.4. Identify resource shortages and possible impact on operations
2. Monitor resource usage and maintenance	2.1. Ensure resource handling is in accordance with established organisational requirements including ***occupational health and safety requirements*** 2.2. Use ***business technology*** to monitor and identify the effective use of resources 2.3. Use consultation with individuals and teams to facilitate effective decision making on the appropriate allocation of resources 2.4. Identify and adhere to relevant ***policies regarding resource use*** in the performance of operational tasks 2.5. Routinely monitor and compare resource usage with estimated requirements in budget plans
3. Acquire resources	3.1. Ensure acquisition and storage of resources is in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with organisational requirements, is cost effective and consistent with organisational timelines 3.2. Acquire resources within available time lines to meet identified requirements 3.3. Review ***resource acquisition processes*** to identify improvements in future resource acquisitions

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to read and understand organisation's policies and procedures; to write simple instructions for a particular routine task
- evaluation skills to diagnose faults and to monitor resource usage
- problem-solving skills to determine appropriate fault repair actions
- numeracy skills to calculate resource expenditure
- technology skills to select and use technology appropriate to a task.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety (OHS)
- organisational resource acquisition policies, plans and procedures
- functions of a range of business equipment
- organisational procedures for record keeping/filing systems, security and safe recording practices.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • collecting and recording data on resource use • observing resource use over defined and operational timeframes • carrying out routine maintenance • knowledge of organisational resource acquisition policies, plans and procedures.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation estimating future and present business resource needs • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of equipment maintenance procedures • review of information provided on the most economical and effective choice of equipment, materials and suppliers • evaluation of documentation reviewing resource acquisition processes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Business resources may include:	• equipment • facilities • human resources • raw materials • software • stock and supplies
Organisational requirements may include:	• access and equity principles and practice • business and performance plans • defined resource parameters • ethical standards • goals, objectives, plans, systems and processes • legal and organisational policies, guidelines and requirements • management and accountability channels • manufacturer's and operational specifications • OHS policies, procedures and programs • quality and continuous improvement processes and standards • quality assurance and/or procedures manuals • security and confidentiality requirements
Occupational heath and safety requirements may include:	• decision making delegations • equipment use • first aid kit • medical attention • reporting requirements • site access
Business technology may include:	• computer applications • computers • modems • personal schedules • photocopiers
Policies regarding resource use	• budgeting limits

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RANGE STATEMENT	
may include:	• ordering procedures • purchasing authorities • recruitment and personnel • time management • transport/travel policies
Resource acquisition processes may include:	• contracted supplier ordering • internal approvals • non-tendered processes • periodic forecasts • tendered processes

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - General Administration

Co-requisite units

Co-requisite units		

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BSBADM401B Produce complex texts from shorthand notes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to take accurate shorthand notes at 80 words per minute from a variety of sources, including dictation and multiple speakers, and to produce complex texts from shorthand notes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who require well developed skills in taking shorthand notes and producing complex texts. They may work as individuals providing administrative support within an enterprise, or may be responsible for the production of their own notes.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Take dictation using shorthand	1.1. Prior to commencing the task, identify organisational and task requirements for the style, presentation and storage of documents 1.2. Clarify ***purpose*** and ***requirements*** of required text with the author/speaker 1.3. Record shorthand notes from a ***dictation source*** at a minimum speed of 80 words per minute, including using ***sophisticated abbreviations*** 1.4. Clarify meaning and spelling of names and technical terms to ensure accuracy of notes 1.5. ***Self-check shorthand notes*** for accuracy
2. Produce complex texts	2.1. Transcribe shorthand notes and produce ***complex texts*** to the required ***degree of accuracy*** 2.2. Ensure texts contain inserted information, objects and formatting as directed by the dictated source and that they reflect the intended meaning 2.3. Produce text within ***designated time lines***
3. Edit and revise texts	3.1. ***Self-check final text*** for accuracy 3.2. Revise, format, print, name and distribute or store text in accordance with ***organisational and task***

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ELEMENT	PERFORMANCE CRITERIA
	requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication and listening skills to follow verbal instructions, to predict context and to interpret intonation and stress • literacy skills to draft complex documents and correspondence using logical structures, to use accurate spelling, and to correct grammar and punctuation • problem-solving skills to edit own writing to address inconsistencies or errors.
Required knowledge

• functions and application of appropriate hardware and software
• key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • occupational health and safety
• organisational policies and procedures
• shorthand symbols.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential:

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EVIDENCE GUIDE	
competency in this unit	• accurately transcribing shorthand notes from dictation at 80 words per minute and 98% accuracy in line with AS 2907:2001 Shorthand speed tests • producing complex texts which accurately reflect the dictation source.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to samples of audio sources for transcription and note taking • access to English and shorthand dictionary.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • demonstration of techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBWRT401AWrite complex documents • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Purpose may include:	• agendas • brochures • flyers

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RANGE STATEMENT	
	• formal or informal correspondence • memos • minutes • newsletters • reports • technical manuals or documents
Requirements may include:	• verbatim motions plus meeting summary i.e. minutes • verbatim record of dictation • verbatim record of meeting
Dictation source may include:	• in person • teleconference • telephone • videoconference • other audio source such as electronic files
Sophisticated abbreviations may include:	• derivatives • short forms • phrases and intersections
Self-checking shorthand notes may include:	• checking correlation between source and notes • clarifying names, addresses and specific spelling with information on file • inserting paragraphs • inserting punctuation • reading over shorthand notes for meaning
Complex texts may include:	• industry specific language • inserted information from a variety of sources • technical language
Degree of accuracy may include:	• correct grammar • correct spelling • correct use of technical vocabulary • intended meaning • 98% accuracy
Designated time lines may include:	• organisational timeline e.g. an agenda or minutes of a meeting • AS 2907:2001 Shorthand speed tests • time line agreed with supervisor or person requiring text
Self-checking final text may include:	• checking grammar • checking intended meaning

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RANGE STATEMENT	
	• checking spelling
Organisational and task requirements may include:	• author/speaker instructions • number of copies • organisational format

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - General Administration

Co-requisite units

Co-requisite units		

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BSBADM405B Organise meetings

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to organise meetings including making arrangements, liaising with participants, and developing and distributing meeting related documentation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who organise a variety of meetings. They may provide administrative support within an enterprise, or have responsibility for these tasks in the context of a particular team, workgroup or project.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Make meeting arrangements	1.1. Identify ***type of meeting*** and its purpose 1.2. Identify and comply with any ***legal or ethical requirements*** 1.3. Identify ***requirements of meeting*** and participants 1.4. Make meeting ***arrangements*** in accordance with requirements of meeting 1.5. Advise participants of meeting details
2. Prepare documentation for meetings	2.1. Prepare notice of meeting, ***agenda*** and meeting ***papers*** in accordance with meeting requirements 2.2. Check documentation for accuracy and correct any errors 2.3. Distribute documentation to participants within designated time lines 2.4. Prepare spare sets of documents
3. Record and produce minutes of meeting	3.1. Take ***notes*** with the required speed and accuracy to ensure an accurate record of the meeting 3.2. Produce ***minutes*** that reflect a true and accurate account of the meeting 3.3. Check minutes for accuracy and submit for approval by the nominated person 3.4. Despatch copies of minutes within designated time lines

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication skills to coordinate and consult with participants, to orally present written reports with a number of defined sections, and to clarify points made in meetings
• literacy skills to:
  • write and compile agenda items
  • record minutes
  • make notes from spoken texts in meetings
  • use a variety of strategies for planning, reviewing and proofreading documentation
• time management skills to allow sufficient time to prepare for and conduct meetings.

Required knowledge

• culturally appropriate communication techniques
• formats for agendas and minutes
• key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • occupational health and safety.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • organising meetings, including informing participants and preparing materials • preparing an agenda • taking minutes during a meeting and preparing draft minutes after the meeting.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • demonstration of techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • writing units • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Type of meeting may include:	• annual general meeting • board meeting • face-to-face

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RANGE STATEMENT	
	• staff meeting • teleconference • videoconference
Legal and ethical requirements may include:	• codes of practice • legislation relating to companies or associations • requirements for public meetings

Requirements of meeting may include:	• meeting structure:
	  • formal
	  • informal
	  • self-managed
	  • semi-formal
	  • structured
	• number of participants
	• purpose of the meeting
	• specific needs of participants
	• specific resources and equipment required by participants e.g. video and data projectors, whiteboards
	• teleconferencing or videoconferencing meeting protocols and equipment
	• voting procedures

Arrangements may include:	• booking an appropriate venue • establishing costs and operating within a budget • organising accommodation and transport • organising appropriate communication technology • organising catering • preparing relevant documentation for participants • scheduling the date and time for the meeting
Agenda may include:	• correspondence • date of next meeting • date, time and location of meeting • general business • major agenda items • matters or business arising from the minutes • minutes of the previous meeting • reports

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RANGE STATEMENT	
	• statement of the meeting's purpose • welcome
Papers may include:	• chairperson's report • committee reports • correspondence • draft documentation • financial reports • itemised meeting papers • minutes of previous meeting • research reports
Notes may include:	• action items • arrangements for next meeting • decisions taken at the meeting • formal motions • future action • issues raised at the meeting • points discussed at the meeting • record of participants who were present at or absent from the meeting (attendees and apologies) • suggestions made at the meeting
Minutes may include:	• meeting details (e.g. title, date, time, location) • agenda items • apologies • names of absent and attending participants • approval of the record of the previous minutes • correspondence • lists rather than complete sentences • matters arising from the previous meetings • other business • reports • date of the next meeting • using organisation templates • using previous minutes to determine required format

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - General Administration

Co-requisite units

Co-requisite units		

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BSBADM406B Organise business travel

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to organise domestic and overseas business travel, including developing associated itineraries, booking travel and accommodation, preparing travel related documentation and making travel arrangements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who are responsible for the organisation of business travel. They may work as individuals providing administrative support within an enterprise, or have responsibility for these tasks in relation to their own workgroup or role.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Organise business itinerary for domestic and overseas travel	1.1. Confirm ***purpose and requirements*** of domestic and overseas travel including planned itinerary, budget, meeting requirements and traveller preferences 1.2. Identify points of contact and names of contact persons, and make and confirm arrangements for meetings in accordance with planned itinerary 1.3. Prepare daily itineraries with appointments, arrival and departure times, accommodation and ***other itinerary details*** in accordance with travel purpose 1.4. Source, prepare and provide documents and support ***material for meetings*** within designated time lines 1.5. Prepare itinerary in accordance with meeting requirements and ***traveller's occupational health and safety*** (***OHS***) ***requirements*** 1.6. Provide itinerary and meeting documents to the traveller within designated time lines
2. Make travel arrangements	2.1. Make ***bookings*** in accordance with organisational policies and procedures for business travel 2.2. Identify and arrange ***travel documents*** in accordance with itinerary and individual requirements 2.3. Confirm and check travel arrangements and

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ELEMENT	PERFORMANCE CRITERIA
	despatch confirmation documents to the traveller within designated time lines 2.4. Negotiate and confirm alternative arrangements in response to changed requirements 2.5. ***Record travel details*** and itinerary in accordance with organisational requirements 2.6. Negotiate and confirm ***communication arrangements*** in accordance with organisational requirements
3. Arrange credit facilities	3.1. Check and confirm ***methods of payment*** 3.2. Make ***credit arrangements*** in accordance with organisational policy and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to organise and confirm travel arrangements with relevant parties
- literacy skills to read a variety of texts and to write clear and detailed instructions in a logical sequence
- planning and organising skills to allow sufficient time to prepare business and travel documentation and to schedule trip according to requirements
- problem-solving skills to select and obtain the most effective travel itinerary
- research skills to locate specific information such as appropriate transport, meeting venues, accommodation, contacts
- technology skills to access online travel and booking resources.

Required knowledge

- booking procedures
- communication techniques to relate to people from diverse backgrounds and people with diverse abilities
- key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice

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REQUIRED SKILLS AND KNOWLEDGE
• privacy laws • OHS • organisational policies and procedures regarding travel, internet sites and other online resources • sources of relevant documents and support material.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • organising business-related travel for others, including scheduling and developing itineraries and travel-related documents • efficiently booking and organising travel within budgets and time constraints to meet traveller and organisation needs.

Context of and specific resources for assessment	Assessment must ensure:
	• access to:
	  • office equipment including telecommunications equipment
	  • travel-related reference material, such as accommodation and transport suppliers
	  • appointment books, scheduling software, diaries and other recording and scheduling systems
	  • preferred suppliers, contact details, websites
	  • maps.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

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EVIDENCE GUIDE	
	• review of authenticated documents from the workplace or training environment • demonstration of techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Purpose and requirements may include considering:	• available accommodation • budget • class of accommodation • class of travel • connections and transfers • mode of travel • time differences • time management • transport timetables
Other itinerary details may include:	• arrangements for meals • contact names and numbers of all personnel involved • required documentation for each appointment • suggested leisure activities • transport arrangements • local money details and accessibility of banks and automatic teller machines (ATMs) where applicable
Material for meetings may include:	• business proposals • catalogues • contracts

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RANGE STATEMENT	
	• electronic presentations • information technology (e.g. laptop, computer software) • meeting papers • office supplies • overhead transparencies • presentation kits • prior work completed for the client • product prototypes or samples • product samples • promotional brochures • reports • telecommunications equipment (e.g. mobile phone, teleconferencing equipment) • tenders
Traveller's occupational health and safety (***OHS***) ***requirements*** may include:	• leisure time • limit on total amount of travel per day • limit on total appointments in any one day • lunch breaks • rest periods • time between appointments • time for connections and transfers • travelling time to reach venues
Bookings may include:	• online • telephone • travel agent
Travel documents may include:	• accommodation confirmation email, facsimile or letter • business schedule and contact details • electronic or printed airline itinerary • e-ticket and/or paper ticket • health or medical-related documentation • insurance details and contacts • list of contacts including overseas if applicable • maps • meeting agenda and other documents • passport • timetable/s • travel itinerary • travel vouchers and accommodation guides

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RANGE STATEMENT	
	• visa/s
Recording travel details may include:	• individual travel file for each key aspect of the trip • making electronic copies of critical travel documents such as passport details page, airline tickets, itinerary • separate file for each business trip • using a diary • using a prepared checklist • using the organisation's standard checklist
Communication arrangements may include:	• email and facsimile access • mobile access • points of contact
Methods of payment may include:	• accounts established with the organisation • company credit cards • purchase order • special arrangement made between the organisation and individual suppliers • providing the traveller with a cash advance • reimbursing traveller for payments made on presentation of receipts
Credit arrangements may include:	• cab charges • currency • debit or credit cards • electronic funds transfer • petty cash • travellers cheques

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - General Administration

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Co-requisite units

Co-requisite units		

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BSBADM407B Administer projects

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes performance outcomes, skills and knowledge required to perform the activities associated with the administrative aspects of a project, such as measurement, monitoring, reporting, and winding up the project on completion. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	The unit focuses on the administration requirements within any project undertaken under the supervision of an experienced project manager. The administrative skills are applied within the context of a project environment. The unit does not apply to project managers or specialist project managers. For specialist project managers, the units of competency in the Project Management competency field will be applicable.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Plan project administration	1.1. Identify and record the purpose, scope and objectives of ***projects*** 1.2. Develop project plans identifying project activities and ***key administrative milestones*** and timelines in accordance with the ***requirements of the project brief*** / ***contract*** and in consultation with stakeholders 1.3. Identify and address factors that affect timeframes in project planning to ensure timeframes are realistic and achievable 1.4. Link project budgets to key outcomes within projects and incorporate reporting mechanisms to ensure payments are made / received as outcomes are achieved 1.5. Identify ***monitoring and reporting arrangements*** for project activities and budgets within project plans in accordance with organisational, statutory and auditing requirements

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ELEMENT	PERFORMANCE CRITERIA
2. Coordinate project administration	2.1. ***Allocate*** and monitor tasks and resources in accordance with project requirements 2.2. Detail project ***expenditure*** in financial control systems, and monitor against project budgets in accordance with project plan 2.3. ***Monitor*** project timeframes and milestones and report to designated person/s in accordance with organisational requirements 2.4. Maintain project records in accordance with project and organisational requirements
3. Finalise and review project administration	3.1. Identify and complete ***procedures for winding up projects*** in accordance with statutory, organisational and auditing requirements 3.2. Review project administration against project plan and ***measure*** and report ***outcomes*** in accordance with organisational and task requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to interpret organisation's goals for the project; write clear and detailed instructions organised sequentially; and identify administrative activities of project
- communication skills to consult with project members; listen and respond constructively; listen to a range of material and process information in a systematic way, including evaluative comments on how these ideas may be applied to a group; and define and monitor objectives of the project group
- problem-solving skills to propose solutions from a range of possible solutions
- research skills to select categories by which to organise information and assess information for relevance, accuracy and completeness
- numeracy skills to forecast and predict timelines; interpret, compare and calculate with money; and use estimation to check calculations and outcomes
- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

Required knowledge

- relevant legislation from all levels of government that may affect aspects of

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REQUIRED SKILLS AND KNOWLEDGE
business operations, such as: • anti-discrimination legislation • ethical principles • codes of practice • privacy laws • environmental issues • OHS • organisational policies and procedures • organisational structure, and lines of authority and communication within the organisation • planning tools • budgeting strategies for projects • techniques for project planning and setting milestones.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • integrated demonstration of all elements of competency and their performance criteria • construction of charts; use of project planning tools to assist with project monitoring • monitoring of timelines, milestones and budgets.
Context of and specific resources for assessment	Assessment must ensure access to: • workplace project documentation • relevant enterprise policies and procedures.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

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EVIDENCE GUIDE	
	• observation of presentations • oral or written questioning to assess knowledge • review of project administrative arrangementswithin project plans • evaluation of project monitoring processes and reports • evaluation of the outcomes of the administrative processes applied within several projects.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Projects may include:	• internal (eg newsletter) • external (eg contracted by external client) • small • large • complex (eg feasibility study)
Project activities may include:	• coordinating staff • ensuring tasks are carried out • communicating advice/information to team • meetings, including preparation of minutes, papers and reports • preparing project plan • preparing project documentation • monitoring financial arrangements • processing invoices • monitoring timelines • monitoring progress

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RANGE STATEMENT	
Key administrative milestones may relate to:	• contract requirements • developing a work plan • use of project planning software • timelines • progress reports • achievement of key tasks/project phases • measurement / achievement of set outcomes • completion of tasks • completion of contract phases/requirements
Requirements of the project brief / ***contract*** may include:	• project scope • performance standards • agreed timelines • goals and objectives • names of parties bound by contract • payment issues • project description • completion requirements • timelines • staffing • ownership of materials • indemnity and insurance
Monitoring and reporting arrangements may include:	• team reports • project control chart • control point chart • milestone chart • budget control chart
Allocating tasks and resources may include:	• identifying tasks to be completed in order to achieve project outcomes • prioritising and scheduling tasks • breaking tasks into sub-tasks • arranging tasks into groups • facilitating team involvement in task allocation • assisting to identify team skills and skills gaps • allocating responsibility • assessing workloads • matching skills to tasks • delegating tasks • budget constraints • necessary documents and reference material • identifying resources required

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RANGE STATEMENT	
Expenditure may include:	• budget considerations • allocated costs • capital expenditure • labour costs • cost of materials and supplies • overhead costs • sub-contractor costs
Monitored timeframes and milestones may include and/or require:	• project progress • performance • communication with team members • coordination of team meetings • feedback sessions • solving problems/issues • facilitating change to project plan
Procedures for winding up projects may include:	• 'signing off' on project completion/delivery of project outcomes • evaluation and review of actual costs compared to budgeted costs • auditing • formal reporting
Measured outcomes may include:	• project objectives • project outcomes • benchmarks • standards • key performance indicators • project monitoring process • achievement of timelines • costs

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Administration - General Administration

Co-requisite units

Co-requisite units		

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BSBADM409A Coordinate business resources

Modification History

Release	Comments
Release 2	New release of this unit released with *version 6 of BSB07* Business *Services Training Package*. • Inclusion of 'environmental sustainability business practices and standards' in the Range Statement

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to determine and analyse existing and required resources, their effective application and the accountability for their use.

Application of the Unit

This unit applies to individuals with a broad knowledge of business resources who contribute well developed skills and knowledge to ensure adequate resources are available to perform the work of the organisation. They may have responsibility to provide guidance or to delegate aspects of these tasks to others.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Determine resource requirements	1.1. Determine ***resource requirements*** in accordance with business and operational plans, and ***organisational requirements*** 1.2. Provide opportunities to individuals and workgroups to contribute to the identification of resource requirements 1.3. Ensure resource expenditure is realistic and makes efficient use of available budget resources 1.4. Present recommendations on resource requirements in the required format, style and structure using relevant ***business equipment and technology***
2. Acquire and allocate resources	2.1. Acquire physical resources and services in accordance with organisational requirements 2.2. Check resources to ensure quality and quantity, in line with service agreements 2.3. Allocate resources promptly to enable achievement of workgroup objectives 2.4. Ensure consultation with individuals and teams on allocation of resources is participative and is conducted using ***appropriate interpersonal skills***
3. Monitor and report on resource usage	3.1. Measure effectiveness of resource planning, and assess against actual costs, identified shortfalls and surpluses 3.2. Develop and implement methods of monitoring resource use to enable timely and accurate reporting against business and operational plans 3.3. Identify improvements in resource planning through consultation and ***feedback***, and implement in accordance with organisational requirements 3.4. Maintain ***records*** concerning equipment and

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ELEMENT	PERFORMANCE CRITERIA
	resource purchases, in accordance with organisational requirements

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to request advice, to receive feedback and to work with a team
- literacy skills to draft complex reports and to display logical information on resource usage
- numeracy skills to interpret, compare and calculate resource usage costs
- planning skills to schedule and track resource use and availability.

Required knowledge

- common equipment faults
- functions of a range of business equipment
- key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - environmental issues
  - occupational health and safety (OHS)
- organisational policies, plans and procedures
- record management processes and techniques related to maintenance schedules.

Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential:

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competency in this unit	• monitoring resource usage to determine resource needs • maintaining records of resource requirements • calculating costs and expenditures in relation to use and maintenance of business resources • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of records relating to business resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of recommendations on resource requirements • review of records concerning equipment and resource purchases • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of functions of a range of business equipment.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration units.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Resource requirements may include:	• human resources • location/premises • OHS resources

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	• plant/machinery • raw materials • refurbishment • staff amenities • stock and supplies • storage space • technological equipment/software • training materials
Organisational requirements may include:	• access and equity principles and practices • business and performance plans • defined resource parameters • ethical standards • goals, objectives, plans, systems and processes • legal and organisational policies, guidelines and requirements • management and accountability channels • manufacturers' and operational specifications • OHS policies, procedures and programs • environmental sustainability business practices and standards • quality and continuous improvement processes and standards • quality assurance and/or procedures manuals • reporting requirements • security and confidentiality requirements
Business equipment and technology may include:	• answering machine • binder • computer • fax machine • photocopier • printer • shredder • telephone
Appropriate interpersonal skills may include:	• clarity of language • consultation methods, techniques and protocols • seeking feedback from group members to confirm understanding • summarising and paraphrasing • using appropriate body language
Feedback sources may include:	• customer/client response data • employee data

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	• equipment meter readings • financial forecasts • sales orders • suppliers' invoices
Records may include:	• computerised or manual • financial statements • invoices • maintenance schedules • order forms • petty cash forms • purchase orders • stock list and inventory control

Unit Sector(s)

Administration - General Administration

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BSBADM411A Produce complex texts from audio transcription

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to transcribe court, parliamentary, police telephone scripts, or medical proceedings and to produce complex and accurate transcriptions within specified time frames. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who require specialist skills in word processing and audio transcription. In most cases they would work in an environment where transcription is a central aspect of their work role, but the unit may also apply to experienced administrative staff for whom transcription is only part of their role.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare for audio transcription	1.1. Prior to commencing the task, identify organisational requirements in the ***transcription of proceedings*** in relation to style, presentation and storage of texts 1.2. Clarify with client the purpose and requirements of transcript and the ***audio media*** to be used
2. Transcribe audio tape or file	2.1. Use accurate keyboarding skills to transcribe and accurately reflect oral proceedings at 70-80 wpm with 98% accuracy 2.2. Review transcript to ensure it presents an accurate and true record of proceedings 2.3. Predict the meaning of unclear speech from the context or clarify with the speaker/author 2.4. Clarify meaning and spelling of names or technical terms to ensure accuracy of the text 2.5. Produce text within ***designated time lines***
3. Edit and revise transcript	3.1. ***Self-check transcription*** for accuracy 3.2. Ensure audio transcription reflects speaker/author intended meaning 3.3. Edit transcript to ensure grammar, punctuation and

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ELEMENT	PERFORMANCE CRITERIA
	syntax are appropriate for intended purpose and audience 3.4. Circulate draft for checking in accordance with organisational and task requirements 3.5. Revise, format, name, store and print transcript in accordance with organisational and task requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and listening skills to:
  - clarify intended meaning
  - predict words from context
  - interpret intonation and stress
- identify speaker's voice and roles in different settings
- keyboarding skills to produce accurate documents at a high speed
- literacy skills to:
  - produce high quality documents with correct spelling, grammar, syntax and punctuation within relevant industries
  - proofread and edit transcripts.

Required knowledge

- advanced word processing software functions
- basic transcription techniques and principles
- key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety
- range of internet resources for relevant industries
- relevant knowledge of aspects of the Australian legal system
- specialist terminology for relevant industries.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • transcribing speed and accuracy • producing text that meets identified purpose and requirements • knowledge of relevant legislation, standards and codes.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources, such as: • workplace reference materials such as style guides • tape recorder including audio-tapes • transcribers or dictaphones for analogue tapes and computer hardware for operating digital audio software • computer equipment including word processing software.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation identifying organisational requirements • analysis of clarification of meaning and spelling of names or technical terms • review of circulation of draft for checking • demonstration of techniques in a workplace or simulated environment.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended,

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EVIDENCE GUIDE	
	for example: • BSBLEG305A Use legal terminology in order to carry out tasks • BSBMED301B Interpret and apply medical terminology appropriately • information and communications technology units • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Transcription of proceedings may include:	• court proceedings • medical and health care industry • parliament • police call centres
Audio media may include:	• audio-tape • digital audio files • micro-cassette tape
Designated time lines may include:	• delayed delivery timeframes • next day • same day
Self-checking of transcription may include:	• clarifying names, addresses and specific spelling from information provided on court log notes including case names and internet research • editing punctuation to comply with accurate interpretation of proceedings • ensuring compliance with requirements unique to different legal and statutory jurisdictions

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - General Administration

Co-requisite units

Co-requisite units		

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BSBADM502B Manage meetings

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage a range of meetings including overseeing the meeting preparation processes, chairing meetings, organising the minutes and reporting meeting outcomes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who are required to organise and manage meetings within their workplace, including conducting or managing administrative tasks in providing agendas and meeting material. They may work as senior administrative staff or may be individuals with responsibility for conducting and chairing meetings in the workplace.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Prepare for meetings	1.1. Develop ***agenda*** in line with stated ***meeting purpose*** 1.2. Ensure style and structure of meeting are appropriate to its purpose 1.3. Identify meeting participants and notify them in accordance with organisational procedures 1.4. Confirm ***meeting arrangements*** in accordance with requirements of meeting 1.5. Despatch ***meeting papers*** to participants within ***designated time lines***
2. Conduct meetings	2.1. Chair meetings in accordance with organisational requirements, agreed ***conventions*** for type of meeting and ***legal and ethical requirements*** 2.2. Conduct meetings to ensure they are focused, time efficient and achieve outcomes 2.3. Ensure meeting facilitation enables participation, discussion, problem-solving and ***resolution*** of issues 2.4. Brief minute taker on method for recording meeting

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ELEMENT	PERFORMANCE CRITERIA
	notes in accordance with organisational requirements and conventions for type of meeting
3. Follow up meetings	3.1. Check transcribed meeting notes to ensure they reflect a true and accurate record of the meeting, and are formatted in accordance with organisational procedures and meeting conventions 3.2. Distribute and ***store minutes*** and other follow-up documentation within designated time lines, and according to organisational requirements 3.3. Report outcomes of meetings as required, within designated time lines

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - participate in sustained complex interpersonal exchanges and to interact with others
  - listen to, incorporate and encourage feedback
  - conduct oral presentations to a group, to consult participants and to answer questions
  - manage and work with a group to construct an action plan
  - chair meetings
- literacy skills to:
  - categorise and organise information
  - assess information for relevance and accuracy
  - identify and elaborate on key agenda items and source additional information
- numeracy and time management skills to allow for sufficient meeting preparation
- problem-solving skills to choose appropriate solutions from available options.

Required knowledge

- culturally appropriate techniques to communicate with people from diverse backgrounds and people with diverse abilities
- key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:

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REQUIRED SKILLS AND KNOWLEDGE
• anti-discrimination legislation • ethical principles • codes of practice • privacy laws • copyright • occupational health and safety • formats for minutes and agendas • group dynamics • meeting terminology, structures, arrangements and responsibilities of chairperson • organisational procedures and policies regarding meetings, chairing and minutes.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • applying conventions and procedures for formal and informal meetings • chairing meetings in relation to agreed agendas.
Context of and specific resources for assessment	Assessment must ensure: • access to reference material in regard to meeting venues, catering, transport suppliers • access to names and contacts for meeting participants • access to office supplies and equipment • access to computers and relevant software.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace

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EVIDENCE GUIDE	
	reports of on-the-job performance by the candidate • review of minutes, agendas and other communication • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Agendas may include:	• correspondence • date, time and location of meeting • date of next meeting • general business • major agenda items • matters or business arising from the minutes • minutes of the previous meeting • reports • statement of the meeting's purpose • welcome
Meeting purpose may include:	• discussion forum for internal or external clients • planning and development of a project • progress of a project • range of business items • setting of enterprise or team goals
Meeting arrangements may include:	• booking an appropriate venue • deciding on process for recording of meeting • establishing costs and operating within a budget

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RANGE STATEMENT	
	• identifying any specific needs of participants • organising accommodation and transport • organising appropriate communication technology • organising catering • organising a minute taker • preparing relevant documentation for participants • scheduling date and time for the meeting
Meeting papers may include:	• agenda • chairperson's report • correspondence • draft documentation • financial reports • itemised meeting papers • notice of meeting • previous minutes • research reports
Designated time lines may include:	• contractual obligations • formal timeframe set by the organisation • informal timeframe set by the administrative organiser • project time lines • statutory requirements (e.g. for annual general meetings) • timeframe decided by participants
Conventions may include:	• casting vote for chairperson • conflict of interest provisions • consensus required • informal discussion • majority of members to agree • moving and seconding formal motions • quorum requirements • restricting discussion to agenda items • speaking through the chairperson • time limit on speakers • waiting to be recognised by the chairperson • voting procedures
Legal and ethical requirements may include:	• codes of practice • legislation relating to companies and

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RANGE STATEMENT	
	associations • requirements for public meetings
Resolution may include:	• agreeing on a course of action • deferring decisions to another meeting
Storage of minutes and other documentation may include:	• authorised access • electronic storage in folders, sub-folders, disk drives, CD-ROM, USBs, tape or server back-up • file names according to organisational procedure • file names which are easily identifiable in relation to the content • file and folder names which identify the operator, author, section, date • filing locations • organisational policy for backing up files • organisational policy for filing hard copies of documents • security
Minutes may include:	• meeting details (e.g. title, date, time, location) • action items • agenda items • apologies and attendees • approval of the record of previous minutes • correspondence • date of the next meeting • formatting from previous minutes • lists rather than complete sentences • matters arising from the previous meetings • names of absent and attending participants • organisation templates • other business • reports • welcome

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Administration - General Administration

Co-requisite units

Co-requisite units		

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BSBADM503B Plan and manage conferences

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan, promote and coordinate conferences, ensuring follow up procedures are incorporated. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who are required to plan and manage conferences. They may work as senior administrative staff, or may be other individuals who have been delegated responsibility for planning and managing a conference.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan conference	1.1. Confirm ***purpose***, required outcomes and ***style*** of conference with ***conference convenor/s*** 1.2. Confirm ***conference facilities*** requirements, ***budget***, and preparation time line with conference convenor/s 1.3. Identify speakers/presenters and/or prepare a call for papers in accordance with conference purpose and style 1.4. Draft conference program in line with stated purpose, and balance choice of ***program elements*** to allow outcomes to be achieved 1.5. Select, invite and brief speakers in accordance with conference program 1.6. Identify participant target group and project numbers in consultation with conference organisers 1.7. Plan conference ***administration requirements*** and tasks, processes and resources to ensure efficient management of conference data and resources
2. Promote conference	2.1. Establish a ***promotion strategy*** that reaches required number of target participants 2.2. Prepare ***publicity material*** in accordance with the promotion strategy and budget allocation/s, and despatch within designated time lines
3. Organise conference	3.1. Make ***conference arrangements*** in accordance with

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ELEMENT	PERFORMANCE CRITERIA
	booking lead times and budget allocation/s 3.2. Record acceptances, receipt fees and confirm participants within designated time lines 3.3. Identify and cater for participants' ***specific needs*** 3.4. Confirm program details and prepare conference papers in accordance with speakers' requirements and conference time line 3.5. Despatch ***pre-conference information*** to participants within designated time lines
4. Coordinate conference proceedings	4.1. Check conference facilities to confirm they meet agreed requirements 4.2. Register participants in accordance with planned ***registration procedures*** 4.3. Communicate to participants any late changes to the published program 4.4. Make ***contingency arrangements*** to ensure the smooth running of the conference 4.5. Ensure speakers' schedules are managed and their conference requirements met throughout the conference 4.6. Manage ***administration requirements*** during conference in accordance with conference plan/schedule
5. Follow up conference proceedings	5.1. Record, report and/or follow-up ***conference outcomes*** in accordance with organisational requirements 5.2. Prepare conference papers for publication and distribution within designated time lines 5.3. ***Post-conference correspondence*** is prepared and despatched within designated timelines 5.4. Finalise receipts and payments, and acquit conference funds in accordance with organisational procedures and audit requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills
• communication skills to liaise with others and to answer questions • literacy skills to read a variety of texts, to prepare general information and papers, and to write formal and informal letters according to target audience • numeracy skills to estimate and check calculations and outcomes • planning and organising skills to arrange times, dates, venues, transport and accommodation to meet the needs of participants • problem-solving skills to anticipate possible problems, and to prepare and implement contingency plans.
Required knowledge

• key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • copyright
  • occupational health and safety
• organisational policies and procedures relating to the tasks required.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • undertaking appropriate preparations and investigations to identify conference requirements • preparing required communications • addressing contingency situations as they arise.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources such as:

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EVIDENCE GUIDE	
	• reference material (conference venues, transport, accommodation, catering) • necessary conference documentation • relevant contact persons, including speakers, clients and management.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Conference ***purpose*** may include:	• expanding business contacts • marketing of products • networking • presentation of findings/research • professional development • promotion • training

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RANGE STATEMENT	
	• a mix of the above
Conference ***style*** may include:	• formal • informal
Conference convenor*/*s may include:	• board of management • steering committee • supervisors/team leaders from different departments
Conference facilities may include:	• amenities • audio-visual equipment • catering • computer equipment • dÃ©cor • electronic whiteboards • flip charts • overhead projectors • parking • room size • screens • stationery
Budget planning may include:	• calculating any possible profits/deficits • calculating expected cost of each task and arrangement • limits set by the enterprise • planning tools and resources (e.g. budget control charts, specific software) • registration of Australian Business Number • setting conference fees (if any) • speakers' fees (if any)
Program elements may include:	• demonstrations • plenary session/s • practice session/s • small groups • video • workshops • a mix of the above
Planning of ***administration requirements*** may include:	• budgetary control • cash management • preparing evaluation questionnaires • registration procedures

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RANGE STATEMENT	
Promotion strategy may relate to:	• date, time and location of the conference • number of participants attending • providing adequate notice and coverage • purpose and nature of the conference • targeting relevant industry groups
Publicity material may include:	• brochures • electronic advertising • flyers • information kits • print advertising
Conference arrangements may include:	• accommodation • catering • consumables • date • equipment • furniture • room layout • time • travel • venue
Specific needs may include:	• accommodation • catering requirements • relevant documents and reference material • social/networking activities • specific points of access and facilities for people with specific support needs • specific equipment and resources
Pre-conference information may include:	• any changes to the conference program originally promoted • confirmation of registration • details of travel and accommodation • pre-reading
Registration procedures may include:	• answering participant queries • directing participants to conference facilities • directing participants to session locations • issuing conference information kits • issuing name tags • recording participant details
Contingency arrangements may	• additional supplies and resources

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RANGE STATEMENT	
include:	• alternative catering suppliers • alternative conference venues • alternative speakers • alternative suppliers of transport and accommodation • back-up equipment • spare sets of documentation
Managing ***administration requirements*** may include:	• addressing specific needs/preferences of participants • announcing breaks • answering queries • directing participants to appropriate rooms • filling in checklists • financial matters • implementing contingency plans • locating additional information/materials as required • preparing and distributing conference evaluation questionnaires to participants • recording absent participants
Conference outcomes may include:	• action list/s • contribution to organisational reports • follow on effects (e.g. increased enterprise profile, increase in enterprise product sales, improved staff performance) • further meetings • profit/loss • recommendations • results of analysis of conference questionnaires
Post-conference correspondence may include:	• financial follow-up / finalisation of accounts • letter/s of thanks to speakers and contributors • reports to relevant groups and individuals

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Administration - General Administration

Co-requisite units

Co-requisite units		

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BSBADM504B Plan or review administrative systems

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan or review the requirements of effective administration systems and procedures for implementing, monitoring and reviewing the system. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who are required to plan or review administrative systems. They may work as senior administrative staff or may have been delegated responsibility for planning or reviewing administrative systems.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan or review administration systems	1.1. Identify ***requirements*** of, or modifications to, ***administration system*** through consultation with ***system users*** and other stakeholders in accordance with organisational and budgetary requirements 1.2. Obtain quotations from ***suppliers***/***developers*** of system in accordance with organisational policy and procedures 1.3. Make selection of supplier or developer in accordance with organisational policy and procedures
2. Implement new or modified administration system	2.1. Identify and develop ***implementation strategies*** in consultation with staff 2.2. Encourage staff to participate in all stages of the implementation process 2.3. Implement system in accordance with organisational requirements 2.4. Define and ***communicate*** procedures for using the system to staff 2.5. Provide ***training and support for staff*** on the use of the new or modified system 2.6. Deal with ***contingencies*** to ensure minimal impact on users
3. Monitor	3.1. ***Monitor*** system for usage, ***security*** and output in

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ELEMENT	PERFORMANCE CRITERIA
administration system	accordance with organisational requirements 3.2. Modify system to meet ***changing needs*** in accordance with organisational requirements 3.3. Clearly identify ***further modifications*** and notify users 3.4. ***Monitor staff training needs*** and train new staff on administration system

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to recommend alternative ways of completing tasks, to discuss changes in routines and procedures, and to monitor and define objectives
- literacy skills to write detailed procedural text, including alternative courses of action
- planning and organising skills to implement system smoothly with a minimum of disruption, to anticipate modifications, to plan system overhauls and to allow sufficient time for training
- problem-solving skills to choose appropriate solutions from a range of possible solutions, to use processes flexibly and interchangeably, and to anticipate problems and modify systems accordingly
- research skills to assemble evidence and to evaluate information for accuracy and relevance.

Required knowledge

- key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - copyright
  - occupational health and safety
- organisational policies and procedures relating to the tasks required.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documenting requirements or modifications to administration system • developing appropriate activities to support system implementation • working with staff to identify system improvements.
Context of and specific resources for assessment	Assessment must ensure: • access to organisational policy and procedure manuals, reference materials and appropriate equipment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • demonstration of techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work

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RANGE STATEMENT	
situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
System ***requirements*** may include:	• components of the system • number and type of users • organisation/staff requirements • purpose and nature of system • purpose and nature of organisation • size of system • skills of existing staff • staff training needs • type of system • work practices
Administration system may include:	• electronic system • paper-based system
System users may include:	• casual personnel • external clients • organisation's personnel
Suppliers/***developers*** may include:	• administration system consultants • computer/software suppliers • efficiency consultants • equipment suppliers • information technology technicians • information technology trainers • internal staff/clients • office equipment suppliers
Implementation strategies may include:	• boosting staff confidence • change management strategies • changing team/organisational culture • ensuring system functions correctly • external consultants • informing relevant persons • modifying system • providing staff training/information sessions • re-defining staff roles • re-distributing office tasks • team goal setting • temporary reduction of workload • testing • trialling

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RANGE STATEMENT	
Communicating procedures may include:	• email messages • facsimile messages • internal newsletter • meetings • office memorandum • photocopied instructions • professional development time • training days
Training and support for staff may include:	• coach, mentor and/or buddy systems • online tutorials • on-the-job trainers • professional development • skills assessment • training handbooks • videos
Contingencies may include:	• loss of staff confidence • need for additional training • need to modify system • temporary reduction of work output
Monitoring of system may include:	• extra administrative support and back-up • feedback from internal/external client/s • observation by trained technician/s • utilising monitoring tools and processes
Security may include:	• confidentiality agreements • passwords • safeguards against computer viruses
Changing needs may include:	• change in the nature and purpose of the system/organisation • change in user requirements • growth or decline in system size • technological advances in administration systems
Further modifications may relate to:	• additional equipment, training • negotiation of timeframes for system implementation • redefinition of administrative roles and duties • specialised software
Monitoring staff training needs may include:	• ongoing assessment of staff skills • ongoing feedback opportunities

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RANGE STATEMENT	
	• providing professional development opportunities

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - General Administration

Co-requisite units

Co-requisite units		

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BSBADM506B Manage business document design and development

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish standards for the design and production of organisational documents and to manage document design and production processes to ensure agreed standards are met. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who require well developed skills in the use of a range of software packages. They use these skills to establish, document and implement consistent standards of document design with an organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish documentation standards	1.1. Identify organisational requirements for information entry, storage, output, and quality of ***document*** design and production 1.2. Evaluate organisation's present and future information technology capability in terms of its effect on document design and production 1.3. Identify types of documents used and required by the organisation 1.4. Establish documentation ***standards and design tasks*** for organisational documents in accordance with information, budget and technology requirements
2. Manage template design and development	2.1. Ensure standard formats and templates suit the purpose, audience and information requirements of each document 2.2. Ensure document templates enhance readability and appearance, and meet organisational requirements for style and layout 2.3. Test templates, obtain organisational and user feedback, and make amendments as necessary to ensure maximum efficiency and quality of presentation

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ELEMENT	PERFORMANCE CRITERIA
3. Develop standard text for documents	3.1. Evaluate ***complex technical functions*** of software for their usefulness in automating aspects of standard document production 3.2. Match requirements of each document with software functions to allow efficient production of documents 3.3. Test macros to ensure they meet the requirements of each document in accordance with documentation standards
4. Develop and implement strategies to ensure the use of standard documentation	4.1. Prepare explanatory notes for the use of standard templates and macros using content, format and language style to suit existing and future users 4.2. Develop and implement training on the use of standard templates and macros and adjust the content and level of detail to suit user needs 4.3. Produce, circulate, name and store master files and print copies of templates and macros in accordance with organisational requirements
5. Develop and implement strategies for maintenance and continuous improvement of standard documentation	5.1. Monitor use of standard documentation templates and macros, and evaluate the quality of documents produced against documentation standards 5.2. Review documentation standards against the changing needs of the organisation, and plan and implement improvements in accordance with organisational procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to present complex instructions orally, to communicate ideas logically, and to explain technical concepts and designs to others
- literacy skills to:
- read and interpret policies and procedures
- review and select technological designs
- consider aspects of context, purpose and audience when designing and formatting texts
- research and analysis skills to evaluate content, structure and purpose of technical

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REQUIRED SKILLS AND KNOWLEDGE
texts, and to adapt task instructions to suit changes in technology • technological skills to manage design requirements and layouts.
Required knowledge
• cost constraints • document production processes • functions of range of software applications, including desktop publishing, word processing and spreadsheets • key provisions of relevant legislation and regulations from all forms of government, codes and standards that may affect aspects of business operations, such as: • anti-discrimination legislation • ethical principles • codes of practice • privacy laws • organisational policies and procedures relating to document design and formatting • sources of expertise external to the organisation or workgroup.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • designing templates or style sheets for use in document design • documenting processes and strategies to ensure implementation.

Context of and specific resources for assessment	Assessment must ensure:
	• access to office equipment and resources, including:
	  • computer hardware and other document production equipment
	  • range of software applications appropriate to the task
	  • media for production of documents

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EVIDENCE GUIDE	
	• access to samples of high quality standardised documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • oral or written questioning to assess knowledge of accounting procedures and techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • information and communications technologyunits • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Documents may be created:	• using a range of commercial or organisational software packages:
	  • databases
	  • desktop publishing
	  • spreadsheets
	  • word processing

Standards and design tasks may include:	• binding • binding media

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RANGE STATEMENT	
	• checking final print copy • client requirements • colour photocopy • copying • creating templates and style or procedures manual • drafting • drawing • editing • electronic or paper-based • enterprise policies and procedures • enterprise templates or house style conventions for margins, fonts, use of colour • final document presentation • formatting • language and style of document • liaison with external personnel • locating and collecting appropriate information or precedents • print quality • production of graphics • production of multiple and subsequent copies • quality standards • use of page layout software • writing
Complex technical functions may include:	• data transfer • display features • embedding • exporting • fields • form fields • formulae • importing • index • linking • macros • merge criteria • sort criteria • table of contents

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - General Administration

Co-requisite units

Co-requisite units		

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BSBADV402B Conduct pre campaign testing

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to pilot an advertising campaign and to make adjustments that will maximise the effectiveness of the campaign. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals in an entry level position in media planning, media buying, account management or advertising roles within an advertising team or media organisation. Individuals undertaking this unit conduct testing of advertising communications and based on the test results refine advertisements to ensure they meet marketing communication objectives.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan for pre campaign testing	1.1. Apply valid and reliable measurement tools for testing ***aspects of the advertisement*** 1.2. Document expected outcomes and targets 1.3. Select the test group and timing of the pilot advertisement in accordance with the advertising brief 1.4. Negotiate media placement in accordance with budgetary and scheduling requirements
2. Pilot the advertisement	2.1. Test the advertisement in accordance with the time and financial requirements of the advertising brief and budgetary requirements 2.2. Conduct data collection in accordance with the requirements of the evaluation tool/s and the advertising brief
3. Utilise pre campaign test results	3.1. Analyse test results for their impact on the advertising campaign 3.2. Make changes to the advertisement or media schedule in response to pre-test information, which meet the requirements of the advertiser 3.3. Provide options for changes to advertisements and

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ELEMENT	PERFORMANCE CRITERIA
	present to the advertiser if required 3.4. Amend advertisements, where necessary, so that they meet ***legal and ethical requirements***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to question, clarify and report on pre-campaign testing activities and results • literacy skills to interpret campaign evaluation requirements, and legal and ethical requirements • numeracy skills to analyse numerical and other data, and to draw conclusions • research skills to evaluate responses collected in testing • teamwork skills to collect test data in conjunction with colleagues • technology skills to use a wide range of software and equipment to conduct pre-campaign testing.
Required knowledge

• principles of advertising as it relates to the marketing mix
• organisational advertising objectives and contents of the advertising, creative and media briefs
• legal and ethical requirements for the advertising industry
• type of media available for advertisements
• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • anti-discrimination legislation
  • consumer protection laws
  • copyright legislation
• ethical principles
• fair trading laws
  • privacy laws
  • Trades Practices Act
• techniques for evaluating advertising effectiveness.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of planning to test an advertising campaign • pilot testing of an advertisement • modifications made to an advertising campaign based on information gained during the testing process for at least one advertisement.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to advertising, creative and media briefs.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports and/or examples of testing results • analysis of responses to case studies and scenarios • demonstration of pre-campaign testing techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of testing undertaken and findings • oral or written questioning to assess knowledge of principles of advertising as it relates to the marketing mix • review of data collection conducted.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other advertising units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Aspects of the advertisement to be tested may include:	• appeal
	• average cost per response
	• convenience of reply documents for consumer, such as:
	  • paper stock
	  • size of form
	  • spacing of blank lines
	• credibility
	• cultural acceptability
	• impact
	• interest-arousing
	• interpretation
	• memorability
	• message clarity
	• most profitable size or length of advertisement
	• product/brand identification
	• production techniques

Legal and ethical requirements may include:	• codes of practice such as those issued by:
	  • Advertising Federation of Australia
	  • Australian Communications and Media Authority
	  • Australian Competition and Consumer Commission
	  • Australian Performing Right Association
	  • Commercial Radio Australia
	  • Free TV Australia
	• cultural expectations and influences
	• ethical principles
	• legislation
	• policies and guidelines
	• regulations

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RANGE STATEMENT	
	• social responsibilities such as protection of children, environmental issues • societal expectations

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Advertising

Co-requisite units

Co-requisite units		

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BSBADV403B Monitor advertising production

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to monitor and report on pre production, production and post production work for advertisements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals in an entry level position in the media planning, media buying, account or advertising management roles within an advertising team or media organisation, who monitor the advertising production process.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Oversee pre production work	1.1. Confirm ***printing***, ***print production***, ***electronic production specifications***, schedule, budget, supplier/s and resource requirements for ***pre-production activities*** 1.2. Monitor ***pre-production activities*** against scheduling and budgetary requirements and report likely overruns for action and approval in accordance with organisational policies and procedures 1.3. Estimate the effect of a delay in pre-production and make recommendations to re-schedule activities to meet the pre-production schedule in accordance with organisational policies and procedures
2. Oversee production processes	2.1. Confirm specifications, ***production schedule***, budget, supplier/s and resource requirements 2.2. Monitor progress against ***production schedule*** and identify likely variations in accordance with organisational policies and procedures 2.3. Gain approvals from relevant persons for schedule variations to production budget allocations in accordance with organisational policies and procedures if required
3. Monitor post production processes	3.1. Confirm specifications, schedule, budget, supplier/s and resource requirements for ***post-production activities***

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ELEMENT	PERFORMANCE CRITERIA
	3.2. Monitor ***post-production activities*** against scheduling and budgetary requirements and report likely variations for action and approval in accordance with organisational policies and procedures
4. Produce monitoring reports	4.1. Produce monitoring reports which contain details of progress for ***pre-production***, production and ***post-production activities***
	4.2. Produce monitoring reports which meet organisational requirements in terms of language, format, content, and level of detail
	4.3. Provide monitoring reports within the required timeframe

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to question, clarify and report while conducting monitoring activities
- literacy skills to read schedules and to write reports
- numeracy skills to read budgets and compare actual versus budgeted expenditure
- teamwork skills to work with colleagues to achieve production objectives
- technology skills to use a wide range of software and equipment to monitor the production of advertisements.

Required knowledge

- legal and ethical requirements for the advertising industry
- principles of advertising as it relates to the marketing mix
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - consumer protection laws
  - copyright legislation
- ethical principles
- fair trading laws

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REQUIRED SKILLS AND KNOWLEDGE
• privacy laws • Trades Practices Act • codes of practice such as those issued by bodies such as the Advertising Federation of Australia, Australian Communications and Media Authority, Australian Competition and Consumer Commission, Australian Performing Right Association, Commercial Radio Australia and Free TV Australia • role/s of production personnel • techniques and production processes for radio, television and cinema, print and websites.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • confirmation of specifications for production activities • monitoring of the pre-, during and post-production activities for creation for at least one advertisement • producing reports on pre-production, production and post-production monitoring activities for at least one advertisement • formulation of recommendations to re-schedule activities in the event of production delays.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual or simulated environment • access to office equipment and resources • access to a production team.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports and/or examples of pre-production, production and post-production

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EVIDENCE GUIDE	
	activities • demonstration of production monitoring techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of the principles of advertising as it relates to the marketing mix • review of monitoring reports.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBADV404B Schedule advertisements.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Printing specifications may include:	• art reproduction, including:
	  • halftones
	  • line art
	  • photography
	  • screens
	• binding/finishing
	• colour reproduction, including:
	  • colour register/s
	  • colour separation
	  • digital colour reproduction
	  • PMS code
	  • process colour
	  • spot colour
	• composition

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RANGE STATEMENT	
	• typesetting
Print production specifications may include:	• computer software programs • desktop publishing • flexography • inkjet printing • letterpress • offset lithography • pre-print production processes • rotogravure • silk screen
Electronic production specifications may include:	• film • live recording • sound recording • video • website involving sound, graphics, animation
Pre-production activities may include:	• artwork • graphics • imposition • music • receipt and review of advertising copy • receipt of visual elements and layout • rehearsals • scripts • set construction • storyboards
Production schedule may include:	• film or video shooting • pre-production, production and post-production work • print • sound recording • website development
Post-production activities may include:	• assembling scenes • dialogue synchronisation • editing • Foley • sound mixing • special effects

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Advertising

Co-requisite units

Co-requisite units		

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BSBADV404B Schedule advertisements

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to prepare and cost media schedules, to book advertising time/space and to lodge advertisements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals in an entry level position in media planning, media buying, account management or advertising roles within an advertising team or media organisation who schedule advertisements.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Confirm advertising and media requirements	1.1. Confirm the availability of the completed advertisement 1.2. Identify and confirm the chosen ***media*** and ***media vehicle*/*s*** from the media plan 1.3. Confirm the timing for public release of the advertisement 1.4. Confirm the budget allocation per medium per advertising period
2. Prepare and cost the media schedule	2.1. Confirm that the duration and ***timing*** of the media schedule meet the requirements of the media plan 2.2. Ensure the ***distribution*** of messages over the duration of the schedule meets the requirements of the media plan 2.3. Identify in the media schedule the number, size/length and placement/timing of advertisements in accordance with the media plan 2.4. Negotiate costs with media vehicles, report any variations from the budget in costs per medium per advertising period, and gain approvals to proceed 2.5. Negotiate and gain approvals for changes from supervisors/account managers to the schedule required by unforeseen problems with media vehicle/s in accordance with organisational policies and procedures

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ELEMENT	PERFORMANCE CRITERIA
	2.6. Cost overall media schedule to meet budgetary requirements
3. Book advertising time/space and lodge advertisements	3.1. Follow booking procedures in accordance with organisational policy and practice using appropriate technology 3.2. Lodge advertisements to meet the deadline requirements of the media vehicle/s in accordance with organisational procedures 3.3. Suggest changes or improvements to organisational scheduling procedures to supervisors or managers

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to question, clarify and gain approvals and to book advertising space • literacy skills to identify information from a media plan and to prepare a media schedule • negotiation skills to obtain desired advertising time or space • numeracy skills to budget, cost and schedule advertisements • organisational and time management skills to meet deadlines.
Required knowledge
• industry products/services such as media types and media vehicles • legal and ethical requirements for the advertising industry • principles of advertising as it relates to the marketing mix • organisational policies and procedures for scheduling advertisements.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification and confirmation of media and media vehicles to be used in accordance with the media plan for at least one advertisement • organising the timing and distribution of advertisements and negotiating the costs with media sellers for at least one advertisement.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to media plans • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports/examples of costing documentation • review of how advertising space and time were obtained • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of media, media vehicle options and availability.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBADV406A Buy and monitor media.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different

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RANGE STATEMENT	
work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Media may include:	• aerial advertising • billboards • cable and satellite television • cinema • direct mail • direct response • exhibitions and trade fairs • point-of-sale • radio • sales literature • sales promotion • short message service (SMS) • sponsorship • television • the press • video • video games • videotext
Media vehicle/s may include:	• aerial advertising • cable and satellite television • cinema • direct marketing • direct response • digital video discs • exhibitions and trade fairs • free-to-air television • internet • magazines • magazines • newspapers • outdoor advertising • podcasting • point-of-sale marketing • promotional marketing • radio

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RANGE STATEMENT	
	• sales literature • sales promotions • video • videotext
Timing may include:	• continuous advertising throughout the year • mindset at point of impact • pre-launch advertising • pre-sale advertising • seasonal advertising
Distribution may include:	• evenly spreading advertisements over the allocated time schedule • advertising in waves, with heavy advertising followed by light or no advertising

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Advertising

Co-requisite units

Co-requisite units		

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BSBADV405A Perform media calculations

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to calculate media costings, to perform media ratings using mathematical techniques and to present resultant findings. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals in an entry level position in a media buying role within an advertising team or media organisation who conduct media calculations to provide quantitative analysis of the effectiveness of advertisements.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Evaluate advertising media budget	1.1. Research and define media terminology 1.2. Categorise media costs 1.3. Calculate costings for selected media 1.4. Investigate and calculate ***agency service fees***
2. Calculate electronic media rating points	2.1. Determine reach and effective reach for each ***advertising media*** 2.2. Determine and present identified ***qualitative*** and ***quantitative attributes*** of media
3. Apply mathematical functions to advertising media tasks and problems	3.1. Calculate percentage shares and variations 3.2. Apply index numbers to a media situation 3.3. Perform calculations on simple index numbers 3.4. Calculate international currency conversions 3.5. Calculate the mean, average and weighted average of selected media data
4. Present media calculations	4.1. Use electronic spreadsheets to perform media calculations 4.2. Clearly present data on selected media

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to interpret and evaluate requirements, and to document reports
- numeracy skills to analyse numerical and other data and to perform media calculations
- problem solving skills to manage contingencies
- technology skills to perform calculations and to create complex spreadsheets.

Required knowledge

- sources of media and comparative data
- media calculation principles and practices including;
  - Average Quarter Hour (AQH)
  - Cost per TARP
  - Cost per Thousand (CPM)
  - Cumulated Audience Reach (CUMES)
  - effective frequency
  - effective reach
  - frequency
  - Gross Rating Points (GRPs)
  - number of responses
  - reach
  - Target Audience Rating Points (TARPS)
- principles of software packages used when performing media calculations
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - consumer protection laws
  - copyright legislation
- ethical principles
- fair trading laws
  - privacy laws
  - Trades Practices Act.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • calculation and presentation of media costings and electronic media ratings using mathematical techniques for media selected to advertise at least one product or service • knowledge of media calculation principles and practices.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to an advertising brief.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on media calculations • demonstration of media rating and mathematical techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in calculating media ratings and advertising media problems • oral or written questioning to assess knowledge of software packages for media calculations • review of media calculations spreadsheets.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other advertising units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Agency service fees may include:	• flat fee • head hours • percentage fee • performance incentives
Advertising media may include:	• electronic mass • new media • print mass • point-of-sale • transit
Media rating measurements may include:	• reach • unduplicated reach • frequency • effective frequency • target audience coverage per media • target audience rating points (TARPS) • gross rating points (GRPs)
Qualitative attributes may include:	• editorial environment • media involvement • message receptiveness • proximity to purchase
Quantitative attributes may include:	• cost efficiency • production costs

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Business Development - Advertising

Co-requisite units

Co-requisite units		

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BSBADV406A Buy and monitor media

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to confirm the requirements specified in a media plan, to conduct negotiations when buying media and to compare actual media performance against media plan objectives. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals in an entry level position in a media planning or buying role within an advertising team or media organisation who are responsible for planning, buying and evaluating media selected to convey advertising communication messages.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan the purchasing of media	1.1. Confirm the requirements of the advertising brief 1.2. Establish the causal relationship between ***marketing communications*** and ***media objectives*** 1.3. Determine how the creative strategy and execution will impact on the proposed media strategy 1.4. Identify how consumer insights relate to media consumption 1.5. Compare and contrast scheduling alternatives
2. Buy media	2.1. Investigate and evaluate ***media market conditions*** 2.2. Conduct negotiations between suppliers for advertisement/commercial placements/spots 2.3. Obtain performance guarantees from media suppliers 2.4. Leverage placement value 2.5. Review proposed media plan against advertising objectives, schedules and budgets
3. Evaluate media performance	3.1. Investigate pre- and post-media performance/ratings and make any necessary changes to the media plan as required 3.2. Evaluate ***media costing data*** to determine effectiveness in relation to return on investment 3.3. Compare actual media performance against media plan objectives

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Compare direct and indirect response rates 3.5. Determine problems/opportunities in the planning and buying process from differences between planned and actual accomplishments 3.6. Modify existing, or investigate alternative, media strategies based on media performance data

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills sufficient to read and interpret advertising briefs and to write reports with complex concepts and ideas
- negotiation skills to obtain advertisement/commercial placements/spots
- organisational and time management skills to sequence tasks and to meet timelines
- research and evaluation skills to determine the effectiveness of media performance.

Required knowledge

- economic, social and industry trends
- industry products/services
- organisational structure/s and roles and responsibilities
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - consumer protection laws
  - copyright legislation
- ethical principles
- fair trading laws
  - privacy laws
  - Trades Practices Act.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • planning, purchasing and evaluating the performance of media used in communicating marketing objectives in at least one advertising campaign.
Context of and specific resources for assessment	Assessment must ensure: • access to advertising brief and media plan • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on media performance • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of relevant legislation, codes of practice and national standards that impact on business operations • reports containing an evaluation of media market conditions • reports containing evaluation of media costing data.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBADV405A Perform media calculations.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Marketing communications may include:	• direct marketing • media • personal selling • promotional marketing • public relations
Media objectives may include:	• high frequency • high reach • product launch
Media market conditions may include:	• clutter • competition • editorial environment • political environment • technological advances
Media costing data may include:	• cost per Target Audience Rating Points (TARPS) • Cost Per Thousand (CPM) • day parts • opportunity to see • responses • run of station • zones

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Advertising

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Co-requisite units

Co-requisite units		

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BSBADV407A Apply media analysis and processing tools

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to compare and contrast the characteristics of media analysis tools to choose the most appropriate software tool to perform media tasks and to evaluate their outcomes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals in an entry level position in a media planning or buying role within an advertising team or media organisation who use specialised media software in conducting their activities.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Evaluate media software tool options	1.1. Compare and contrast the ***characteristics*** and specific functions of ***media software tools*** when developing a media plan 1.2. Evaluate the advantages and disadvantages of media software tools that could be used to perform media tasks 1.3. Contrast and evaluate the ***functions*** of media software tools to perform media analysis and processing tasks 1.4. Generate media recommendations which meet advertiser's requirements
2. Use media software tools to perform media tasks	2.1. Use media software to segment target audience 2.2. Ensure program ***demographics*** match marketing objectives 2.3. Analyse radio and television survey data and logs to determine most appropriate media placements
3. Analyse campaign performance	3.1. Evaluate media performance results by channels, programs and days of the week to determine performance against desired marketing objectives 3.2. Compare media performance against expected demographics by program and time periods 3.3. Present campaign performance results to advertiser

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to read and interpret advertising briefs, to analyse data and to write reports • numeracy skills to evaluate quantitative figures generated by media reports • presentation skills to present findings of campaign performance • research and data collection skills to analyse media performance data and information • technology skills to apply functions of media software to perform media tasks.
Required knowledge

• data processing methods and analysis techniques
• industry products/services
• organisational structure/s, roles and responsibilities
• principles, advantages, disadvantages and applications of specific software to perform media tasks
• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • anti-discrimination legislation
  • consumer protection laws
  • copyright legislation
• ethical principles
• fair trading laws
  • privacy laws
  • Trades Practices Act.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • evaluation and application of relevant media software options to perform media analysis tasks for at least one advertising campaign • analysis and presentation of media performance for at least one advertising campaign.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of the use of media software • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of the advantages and disadvantages of specific software to perform media tasks • observation of presentation of campaign performance results to advertiser • evaluation of media performance results.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBADV405A Perform media calculations • BSBADV406A Buy and monitor media.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work

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RANGE STATEMENT	
situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Characteristics may include how media software tools:	• evaluate media plans • perform media tasks • reach audiences
Media software tools may include:	• Adequest eTAM • AdSystems • Asteriod • BCC/TSS • MaxMedia • Media Advisor • Media Wise Optimiser • Panorama • Prodigy • Radioscope • TeleMinute • Web Ratings
Functions may include:	• analyse media performance data • conduct statistical analyses • develop media plans
Demographics may include:	• age • income • marital status • education level

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Advertising

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Co-requisite units

Co-requisite units		

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BSBADV408A Review advertising media options

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake research that supports work with a range of advertising media. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals requiring a broad knowledge of advertising media, particularly people new to the advertising field. It is not assumed that individuals at this level would have responsibility for supervising the work of others. However, it is assumed that their work will support effective work practices across the organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Research advertising media options	1.1. Clarify ***advertising media options*** for review, and record scope of review 1.2. Identify local, state or territory, national and international networks for advertising professionals 1.3. Identify other sources of information about advertising media options 1.4. Select ***research strategy*** suitable to the topic 1.5. Consult with ***relevant personnel*** 1.6. Undertake research into a range of advertising media options for a particular product or service 1.7. Critically analyse strengths and weaknesses of each option
2. Review policy and procedures frameworks	2.1. Locate and review policies and procedures relevant to the advertising media options being researched 2.2. Review ***legislation***, ***regulations***, ***standards and ethical requirements*** that apply to the advertising media options
3. Report on research outcomes	3.1. Collate, analyse and record key findings of the review as they relate to advertising 3.2. Compile a report on research outcomes 3.3. Develop recommendations for advertising media options suitable for a particular product or service

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Present report in agreed format to relevant personnel

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• initiative and enterprise skills to select and use a range of research strategies • judgement and decision-making skills to review ethical and policy frameworks and recommend suitable advertising media options • learning skills to select and use an appropriate research strategy • literacy skills to research an issue and produce a clear and legible report that documents key issues
Required knowledge
• legal and ethical requirements for working with advertising media • range of advertising media options • range of research strategies and their suitability for different purposes • sources of information and networks on advertising media

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• research report that reviews a range of advertising media options and which includes:
	  • research methodology and sources of information used
	  • description of chosen advertising media options
	  • strengths and weaknesses of each option

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EVIDENCE GUIDE	
	• recommendations for use of selected advertising media options for a particular product or service.
Context of and specific resources for assessment	Assessment must ensure access to: • a workplace or simulated work environment • relevant workplace documents and personnel • office equipment and research resources.
Method of assessment	The following assessment methodsare appropriate for this unit: • assessment of report on outcomes of research • evaluation of research undertaken • oral or written questioning to assess knowledge of a range of advertising media options, and their strengths and weaknesses • review of portfolio of evidence showing the research process and the information gathered about advertising media options.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Advertising media options could include:	• aerial advertising • billboards and posters • cable and satellite television • cinema • digital video discs • direct mail • direct response • email marketing • free to air television • internet • magazines

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RANGE STATEMENT	
	• new media, including multimedia and hypermedia • newspapers • outdoor • personal selling • podcasting • point of sale • radio • sponsorship • telemarketing • transit media • video • video games • videotext.
Research strategy may include:	• interviews • literature searches of print and online resources • statistical analyses • surveys • websites.
Relevant personnel may include:	• experienced marketing and advertising practitioners • industry experts and spokespersons • managers and team leaders • training and development staff.

Legislation, ***regulations***, ***standards and ethical requirements*** may include:	• legislation, including:
	  • anti-discrimination legislation
	  • consumer protection laws
	  • copyright legislation
	  • fair trading laws
	  • OHS legislation
	  • privacy laws
	  • Trade Practices Act
	• codes of practice, such as those issued by:
	  • Advertising Federation of Australia
	  • Australian Communications and Media Authority
	  • Australian Competition and Consumer Commission
	  • Australasian Performing Right Association
	  • Commercial Radio Australia
	  • Free TV Australia
	• cultural expectations and influences
	• ethical principles

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RANGE STATEMENT	
	• social responsibilities, such as protection of children and environmentally sustainable practices • societal expectations.

Research re

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business development - advertising

Co-requisite units

Co-requisite units		

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BSBADV503B Coordinate advertising research

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit covers the performance outcomes, skills and knowledge required to conduct primary and secondary advertising research to test advertising themes and ideas. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a supervisory or management advertising role within an advertising team or media organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Assess advertising research requirements	1.1. Analyse ***information about the consumer***, ***the product and the market environment*** to identify and justify the need for further research 1.2. Assess creative concepts to determine and justify the need for ***concept testing*** 1.3. Assess media options and scheduling to determine and substantiate the need for media research 1.4. Identify and assess ***legal***, ***ethical and cultural considerations*** for advertising research to determine their impact on research methods
2. Select research method/s	2.1. Confirm research budget and timeframe in selecting appropriate research method/s 2.2. Assess the capacity of ***primary*** and ***secondary research*** methods to provide the required information 2.3. Select pre-test advertising method/s which are the most likely to provide the required information on time and within budget 2.4. Prepare a research brief that specifies research objectives and method/s, budget, time, schedule and reporting requirements
3. Utilise advertising research findings	3.1. Analyse research results using ***appropriate techniques*** to identify ***findings*** and their impact on

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ELEMENT	PERFORMANCE CRITERIA
	advertising strategies, budgets and time lines 3.2. Adjust advertising strategies, budgets and time lines to reflect research findings 3.3. Revise advertising strategies to meet ***legal and ethical requirements***, and the requirements of the advertiser

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to interpret data and to evaluate how the data may be used
- literacy skills to interpret legal and ethical requirements, and to prepare research briefs and reports
- numeracy skills to collate and analyse data
- research and data collection skills to collect market research.

Required knowledge

- legal and ethical requirements affecting market research
- organisational policy and procedures for conducting market research
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - consumer protection laws
  - copyright legislation
- ethical principles
- fair trading laws
  - privacy laws
  - Trades Practices Act
- requirements for time, cost, scope as determined in the advertising brief
- range of available market research and data analysis techniques
- statistical and research methods and techniques.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of assessment and selection of appropriate techniques to identify advertising research requirements for at least one product or service • preparation of a research brief specifying objectives, methods, budget, time, schedule, reporting and human resource requirements for at least one advertising campaign.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to primary and secondary research information.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports/examples of research briefs • demonstration of market research selection techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of market research conducted • oral or written questioning to assess knowledge of organisational policy and procedures for conducting market research • review of adjustments to advertising strategies, budgets and time lines to reflect research findings.
Guidance information for	Holistic assessment with other units relevant to the

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EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended, for example: • other advertising units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information about the consumer, ***the product and the market environment*** may include:	• buyer behaviour • competitive advantage • competitive factors • demographics • distribution channels • economic, social and cultural factors • existing customers and their product usage • pricing • problems and opportunities facing the product • product and brand image • product brand • product characteristics • product packaging • results of past advertising for the product • target market • values or attitude factors
Concept testing may include presenting material to evaluate consumer reaction, such as:	• a short product description • drawing • dummy advertisement

Legal, ***ethical and cultural considerations*** may include:	• codes of practice such as those issued by:
	  • Advertising Federation of Australia
	  • Australian Communications and Media Authority
	  • Australian Competition and Consumer

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RANGE STATEMENT	
	Commission • Australian Performing Right Association • Commercial Radio Australia • Free TV Australia • confidentiality • cultural sensitivity • privacy
Primary research may include carrying out original research to gather information for a specific purpose such as:	• attitude surveys • experiments or market testing on a segment of the market • group interviews • indirect research such as depth or focus group interviews, projective questioning, association tests • interviews (face-to-face and telephone) • observation • panel research • questionnaires • quota sampling • retail audits to determine brand share • sampling • specialised research e.g. 'mystery shoppers' • surveys
Secondary research may include:	• data that has already been collected by external sources such as: • published government statistics • polls published by advertising and media companies • chamber of commerce data • university databases • data held by research organisations • data that has been collected by internal company sources such as: • sales or distribution figures • financial information • cost analyses
Appropriate techniques may include:	• application of statistical methods • critical analysis • mathematical calculations

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RANGE STATEMENT	
Findings may include:	• facts • interrelationships • issues • patterns • trends
Advertising strategies may include:	• communication objectives • creative and media strategies • identification of advertising purpose and objectives • target audience strategies
Legal and ethical requirements may include:	• codes of practice • cultural expectations and influences • ethical principles • legislation • policies and guidelines • regulations • social responsibilities such as protection of children, environmental issues • societal expectations

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Advertising

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBADV507B Develop a media plan

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to interpret an advertising brief to develop a media plan within a given budget. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a supervisory or management advertising role within an advertising team or media organisation. It may also apply to someone working within a direct marketing role who is responsible for planning media requirements for direct marketing campaigns or offers.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Define media requirements	1.1. Identify the ***target audience characteristics*** from the advertising brief and prepare a detailed ***consumer profile*** which uses the same terms as those used to describe media audiences 1.2. Analyse ***product market factors*** to determine the reach and frequency requirements of advertising media selected 1.3. Analyse the ***creative requirements*** of the advertising message and determine the media implications 1.4. Identify media ***merchandising requirements*** from the advertising brief 1.5. Confirm the media budget and identify ***legal and voluntary constraints***
2. Select media vehicles	2.1. Weigh up the relative merits of identified ***media vehicle*** alternatives taking past media performance into account 2.2. Evaluate and test new or alternative ***media vehicles*** with other advertisers and against proven vehicles 2.3. Select ***media vehicles*** that target the required audience, meet ***media requirements*** and fulfil merchandising requirements within budget 2.4. Select ***media vehicles*** that meet the creative, reach and frequency requirements of the advertising message to be achieved within the budget

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ELEMENT	PERFORMANCE CRITERIA
	2.5. Ensure selected ***media vehicles*** meet legal and ethical requirements
3. Determine the media schedule	3.1. Ensure the duration and ***timing*** of the media schedule meet the requirements of the advertising brief 3.2. Determine the ***distribution*** of messages over the duration of the schedule to meet the requirements of the advertising brief 3.3. Create a ***media schedule*** to the satisfaction of the advertiser 3.4. Develop alternative media schedules for the advertiser within the budget 3.5. Determine testing schedule for the media plan and continually modify media plan in accordance with results obtained
4. Produce a media plan	4.1. Create a media plan which defines the media requirements of the advertising brief and provides evidence to support each requirement 4.2. Specify the recommended media and vehicle/s, and the ***rationale*** for their selection in the media plan 4.3. Ensure the media plan contains a ***budget allocation*** per medium per advertising period 4.4. Identify the anticipated impact of the advertising and ***measures to assess its effectiveness*** in the ***media*** plan

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to consult on the media schedule • evaluation skills to compare and weigh advantages of one medium over another, and to match characteristics with media requirements • literacy skills to interpret the characteristics of different media and to match them to the requirements of the advertising brief.
Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE

• data analysis and matching techniques
• legal and ethical requirements relating to the advertising industry
• organisational products and services offered
• organisational budget and resource constraints
• principles and characteristics of advertising media, types of media and advertising strategies
• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • anti-discrimination legislation
  • consumer protection laws
  • copyright legislation
• ethical principles
• fair trading laws
  • privacy laws
  • Trades Practices Act
• terms for describing media audiences.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• production of a media plan for an advertising campaign for at least one product or service which:
	  • defines the media requirements of the advertising brief
	  • specifies rationales for media vehicles chosen
	  • contains budgetary allocation for each advertising medium
	• measures to assess effectiveness of media vehicles selected.

Context of and specific resources for	Assessment must ensure:

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EVIDENCE GUIDE	
assessment	• access to an actual workplace or simulated environment • access to office equipment and resources • access to the advertising brief.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of documented media plans • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of media plans • oral or written questioning to assess budget knowledge • review of media schedule.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBADV511A Evaluate and recommend advertising media options.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Target audience characteristics may include:	• analysis of current customers • attitudes • cultural factors • demographics • duplication or presence on customer and outside lists

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RANGE STATEMENT	
	• existing product usage • geographics • lifestyle • psychographics • social factors • values

Consumer profile may include:	• behaviouristic information such as:
	  • benefits sought by buyer
	  • loyalty status
	  • readiness stage
	  • user status
	• combinations of geographic, demographic and psychographic information often including data on media consumption and retail outlet usage overlaid
	• demographic information such as:
	  • age
	  • education
	  • gender
	  • income
	  • marital status
	  • number of children
	  • nationality
	  • occupation
	  • statistical descriptions
	• geographic information such as:
	  • Census Collector District (CCD)
	  • census information
	  • home address
	  • nation of residence
	  • postcode
	  • state or territory of residence
	  • work address
	• psychographic information such as:
	  • activities
	  • attitudes
	  • interests
	  • lifestyle
	  • opinions

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RANGE STATEMENT	
	• values

Product market factors may include:	• whether a product or service:
	  • is convenient
	  • is differentiated or undifferentiated
	  • is established
	  • is frequently or infrequently purchased
	  • is highly competitive
	  • is new
	  • has a high or low level of audience involvement
	• whether the message characteristics are:
	  • ongoing
	  • simple
	  • unique

Creative requirements may include:	• action • cluttered or uncluttered medium • colour • electronic or physical form • fast production time • intrusive medium • local, national or international medium • longer and more profitable space requirements • longer and more profitable time requirements • paper stock • pictures or illustrations • prestigious medium • printing requirements • production technique costs • response forms • sound • words only
Merchandising requirements may include:	• association with a particular media vehicle to give the perception of safety and value • identification with a particular local community • number of required responses

Legal and voluntary constraints may include:	• codes of practice such as those issued by:
	  • Advertising Federation of Australia
	  • Australian Communications and Media

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RANGE STATEMENT	
	Authority • Australian Competition and Consumer Commission • Australian Performing Right Association • Commercial Radio Australia • Free TV Australia • cultural expectations and influences • ethical principles • legislation, including occupational health and safety legislation • policies and guidelines • regulations • social responsibilities such as protection of children, environmental issues • societal expectations
Media vehicles may include:	• aerial advertising • billboards • cable and satellite television • cinema • direct mail • direct response • exhibitions and trade fairs • internet • point-of-sale • radio • sales literature • sales promotion • sponsorship • television • the press • video • video games • videotext
Media requirements may include:	• number of target audience reached • required number of responses, including: • current customer base versus expected attrition and growth target • conversion factor for multi step offers/campaigns • required cost per response

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RANGE STATEMENT	
Timing may include:	• continuous advertising throughout the year • pre-launch advertising • pre-sale advertising • seasonal advertising
Distribution may include:	• advertisements evenly spread over the time schedule • advertisements in waves, with heavy advertising followed by light or no advertising • generation of a budgeted number of responses at no more than the budgeted cost per response
Media schedule includes:	• number of advertisements • placement of advertisements • size/length of advertisements
Rationale may include:	• dissimilarity to any proven media and/or media vehicle, but worth a controlled test based on similarity between media/vehicle audience and organisational customer base • proven ability to reach target audience in the past • proven ability to generate profitable responses in the past • similarity to proven media vehicle/s • similarity between media vehicle/s, audience and organisational target audience or customer base
Budget allocation may include:	• allocation of online budget based on maximum cost for pay per click • allocation per medium based on number of times media and/or media vehicle can be used within the period while maintaining the budgeted average cost per response • budgeted number of responses required for the period • maximum daily budget
Measures to asses its effectiveness may include:	• attitude measurements • awareness measurements • cost per response • gross profit per contact • inquiry measurements • market tests • media audience measurements

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RANGE STATEMENT	
	• number of responses • opinion measurements • physiological measurements • readership measurements • recall measurements • sales measurements • split cable tests • split-run tests • tests of different creative executions • tests of different direct marketing offers • tests of different media vehicles • theatre tests

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Advertising

Co-requisite units

Co-requisite units		

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BSBADV509A Create mass print media advertisements

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to create mass print media advertisements that communicate the key features of a product, service or idea to the consumer. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a supervisory or management advertising role within an advertising team or media organisation who are primarily responsible for the development of mass print advertisements. Individuals undertaking this unit may develop mass print media advertisements themselves or coordinate a team to produce the advertisement.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Interpret a creative brief	1.1. Confirm the ***central idea*** or creative concept, technique/s for expressing the idea/concept and ***mass print media*** to be used 1.2. Identify and check the ***advertising content*** and ***supporting information*** for accuracy and completeness 1.3. Confirm the time, schedule and budget requirements for creating the advertisement/s 1.4. Identify ***legal and ethical constraints***
2. Create a mass print media advertisement	2.1. Determine and produce the ***elements of a print advertisement*** to communicate the required image, features and benefits of the product or service 2.2. Size and position each element of the print advertisement to achieve balance and focus for the advertisement 2.3. Ensure the typeface selections suit the product and the central idea of the advertisement, and the layout balances white space and margins 2.4. Ensure the layout of the advertisement unifies the elements, attracts the reader to the focal point and guides the reading sequence

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ELEMENT	PERFORMANCE CRITERIA
	2.5. Ensure the advertisement meets the requirements of the advertising brief and that it meets legal and ethical requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- creativity and innovation skills to write engaging scripts, and to use visual and design techniques to communicate advertising messages efficiently and effectively
- literacy skills to interpret requirements and to write for a variety of audiences and purposes.

Required knowledge

- industry, services, products and organisation
- legal and ethical requirements relating to the advertising industry
- principles and purposes of advertising
- principles of consumer behaviour and influences on buyer behaviour
- principles of creative elements in print advertisements
- range of available advertising approaches for different markets
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - consumer protection laws
  - copyright legislation
- ethical principles
- fair trading laws
  - privacy laws
  - Trades Practices Act
- requirements for advertising timelines, budget, central idea, resources as specified in the advertising brief.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• the production of at least three mass print advertisements in accordance with an advertising and creative brief including:
	  • a newspaper advertisement
	  • a magazine advertisement
	  • an outdoor advertisement.

Context of and specific resources for assessment	Assessment must ensure: • access to advertising copy to be used in the advertisement • access to an actual workplace or simulated environment • access to office equipment and resources • access to advertising and creative briefs.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports/examples of mass print advertisements • demonstration of techniques used to create mass print advertisements • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of principles and purposes of advertising • review of legal and ethical constraints identified.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBWRT501AWrite persuasive copy.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Central idea may include a verbal (text or headline) or visual (illustration) device used to present the content to the reader, listener or viewer of the advertisement, such as:	• analogy and association • case histories • celebrities • continuing characters • demonstrations • exaggerated situations • fantasy • photographic tricks or special effects • product uses • recipes • slice-of-life situations • testimonials
Mass print media may include:	• magazines • newspapers • outdoor advertising
Advertising content may include information to be communicated to the audience such as:	• brand or image factors • competitive advantages • features of the product/service • product/service colour • product/service price • where the product/service may be obtained
Supporting information may include:	• evidence to support the claimed benefit • purchasing information • reassurances for existing users • requirement to specify the target audience

Legal and ethical constraints may include:	• codes of practice such as those issued by:
	  • Advertising Federation of Australia
	  • Australian Communications and Media Authority
	  • Australian Competition and Consumer

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RANGE STATEMENT	
	Commission • Australian Performing Right Association • Commercial Radio Australia • Free TV Australia • cultural expectations and influences • ethical principles • legislation, including occupational health and safety legislation • policies and guidelines • regulations • social responsibilities such as protection of children, environmental issues • societal expectations
Elements of a print advertisement may include:	• borders • boxes • captions • colour • copy • coupons • headlines • logos • mandatory product or service information • shading • signatures • slogans • visuals

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Advertising

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Co-requisite units

Co-requisite units		

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BSBADV510A Create mass electronic media advertisements

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to communicate the key features of a product, service or idea to a consumer using mass electronic media. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a supervisory or management advertising role within an advertising team or media organisation who are primarily responsible for the development of mass electronic advertisements. Individuals undertaking this unit may develop mass electronic media advertisements themselves or coordinate a team to produce the advertisement.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Interpret a creative brief	1.1. Confirm the ***central idea*** or creative concept, technique/s for expressing the idea/concept and ***mass electronic media*** to be used 1.2. Identify and check the ***advertising content*** and ***supporting information*** for accuracy and completeness 1.3. Confirm the time, schedule and budget requirements for creating the advertisement/s 1.4. Identify ***legal and ethical constraints***
2. Create a radio advertisement	2.1. Determine the length, pace and format for the radio advertisement in accordance with the creative brief and the allocated budget 2.2. Determine the content of the opening, middle and close of the radio advertisement to create impact, introduce the central idea, provide support for key product benefits, and provide information to facilitate consumer action 2.3. Prepare scripts to meet the ***requirements of the producer and performer/s*** and the allotted time 2.4. Ensure the radio advertisement meets the requirements of the advertising brief and that it

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ELEMENT	PERFORMANCE CRITERIA
	meets legal and ethical requirements
3. Create a television or cinema advertisement	3.1. Determine the length, pace and ***format*** for the advertisement in accordance with the creative brief and the allocated budget 3.2. Prepare scripts and storyboards to record the visual plan and to identify ***creative elements*** that meet the requirements of the creative brief 3.3. Ensure the advertisement attracts attention and sustains interest through coordination of action and motion visual effects, with audio to support the visual image/s 3.4. Ensure the advertisement meets the requirements of the advertising brief and that it meets legal and ethical requirements
4. Create an internet, web or podcast advertisement	4.1. Determine and produce copy and design elements to communicate the required image, features and benefits of the product or service 4.2. Size and position each element of the advertisement to achieve balance and focus for the advertisement 4.3. Ensure typeface selections suit the product and the central idea of the advertisement, and the ***layout*** balances white space and margins 4.4. Design site map, navigation buttons, frames and multiple pages for ease of use 4.5. Ensure sound, animation and graphics do not distract from the content of the advertisement 4.6. Ensure the advertisement meets the requirements of the advertising brief and that it meets legal and ethical requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• creativity and innovation skills to write engaging scripts, and to use visual and design techniques to communicate advertising messages efficiently and effectively • research, data collection and evaluation skills to compare and weigh advantages of

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REQUIRED SKILLS AND KNOWLEDGE
one medium over another, and to match characteristics with media requirements • literacy skills to interpret the characteristics of different media and to match them to the requirements of the advertising brief • technology skills to use a range of office equipment and software.
Required knowledge

• industry, services, products and organisation
• legal and ethical requirements relating to the advertising industry
• principles and purposes of advertising
• principles of consumer behaviour and influences on buyer behaviour
• principles of creative elements in electronic advertisements
• range of available advertising approaches for different markets
• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • anti-discrimination legislation
  • consumer protection laws
  • copyright legislation
• ethical principles
• fair trading laws
  • privacy laws
  • Trades Practices Act
• requirements for advertising timelines, budget, central idea, resources as specified in the advertising brief.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • the production of at least three mass electronic advertisements in accordance with an advertising and creative brief, including: • a radio advertisement

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EVIDENCE GUIDE	
	• a television or cinema advertisement • a web or podcast advertisement.
Context of and specific resources for assessment	Assessment must ensure: • access to advertising copy to be used in the advertisement • access to an actual workplace or simulated environment • access to office equipment and resources • access to advertising and creative briefs.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports/examples of mass electronic advertisements • demonstration of techniques used to create mass electronic advertisements in a workplace or simulated environment • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of principles of consumer behaviour and influences on buyer behaviour • review of internet, web or podcast advertisements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBWRT501AWrite persuasive copy.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and

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RANGE STATEMENT	
regional contexts) may also be included.	
Central idea may include a verbal (text or headline) or visual (illustration) device used to present the content to the reader, listener or viewer of the advertisement, such as:	• analogy and association • case histories • celebrities • continuing characters • demonstrations • exaggerated situations • fantasy • photographic tricks or special effects • product uses • recipes • slice-of-life situations • testimonials
Mass electronic media may include:	• cinema • internet • podcasting • radio • television
Advertising content may include information to be communicated to the audience such as:	• brand or image factors • competitive advantages • features of the product/service • where the product/service may be obtained • product/service price • product/service colour
Supporting information may include:	• evidence to support the claimed benefit • purchasing information • reassurances for existing users • requirement to specify the target audience

Legal and ethical constraints may include:	• codes of practice such as those issued by:
	  • Advertising Federation of Australia
	  • Australian Communications and Media Authority
	  • Australian Competition and Consumer Commission
	  • Australian Performing Right Association
	  • Commercial Radio Australia
	  • Free TV Australia
	• cultural expectations and influences
	• ethical principles

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RANGE STATEMENT	
	• legislation, including occupational health and safety legislation • policies and guidelines • regulations • social responsibilities such as protection of children, environmental issues • societal expectations
Advertising copy consists of:	• the words used in print and broadcast advertising
Requirements of the producer and performer/s may include:	• audio direction • coordination of music and sound effects with spoken words • cues • descriptions • detailed message content • instructions • manner of delivery • words to be spoken
Creative elements may include:	• action progression • action scenes • audio details • camera shots • composition of film and video shots • film and video details • graphics effects • interaction of audio and video • key frames • lighting effects • location • music • props • set • sound effects • talent • voices

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Advertising

Co-requisite units

Co-requisite units		

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BSBADV602B Develop an advertising campaign

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to determine key objectives and to develop an advertising campaign to optimise product or service market performance in response to an advertising brief. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a senior advertising management or account management role within an advertising or media organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Define campaign objectives	1.1. Clarify the advertiser's purpose and objectives from the advertising brief and use these to set ***objectives for the advertising campaign*** 1.2. State campaign objectives in measurable terms and identify the nature and extent of what the advertising is to accomplish 1.3. Ensure campaign objectives are feasible, given the constraints of time, budget, product and market factors 1.4. Ensure campaign objectives take into consideration ***factors which may affect consumer responses*** 1.5. Ensure campaign objectives meet ***legal and ethical requirements***
2. Prepare an advertising budget	2.1. Assess and specify ***research resource requirements*** for the advertising campaign 2.2. Assess and specify resource requirements for a range of ***media options***, ***creative and production services*** 2.3. Justify resources allocated to each component of the advertising campaign and ensure they are sufficient, in relative terms, to achieve the campaign objectives 2.4. Ensure the overall budget meets the requirements of the advertising brief
3. Develop a schedule	3.1. Confirm the campaign length and timing from the

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ELEMENT	PERFORMANCE CRITERIA
for proposed advertising activities	advertising brief 3.2. Identify service providers with the required expertise and negotiate their costs and availability 3.3. Base the choice of service providers on merit and value for money and ensure the selection meets legal and ethical requirements 3.4. Ensure the time allowed in the schedule to meet creative, media and production requirements is sufficient to achieve the advertising objectives 3.5. Include milestones for monitoring progress and expenditure against budget, and for evaluating campaign effectiveness in the schedule

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to question, clarify and report when creating an advertising campaign
- literacy skills to write in a range of styles for different audiences and to interpret legal requirements, company policies and procedures
- numeracy skills to develop budgets and schedules
- organisational and time management skills to plan projects, meet deadlines and allocate tasks
- technology skills to use a wide range of office equipment and software to develop an advertising campaign.

Required knowledge

- principles of effective advertising for different markets
- contents of advertising briefs
- industry, services, products and organisation
- legal and ethical requirements pertaining to the advertising industry
- organisational products or services
- principles and purposes of advertising, consumer behaviour and influences on buyer behaviour
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice

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REQUIRED SKILLS AND KNOWLEDGE
and national standards, such as: • anti-discrimination legislation • consumer protection laws • copyright legislation • ethical principles • fair trading laws • privacy laws • Trades Practices Act • requirements for advertising timelines, budget, central idea, resources as specified in the advertising brief.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of at least one advertising campaign which meets the advertiser's purpose and objectives as specified in the advertising brief and contains: • specified timelines for task completion • resource requirements • budgetary allocations.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to an advertising brief.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of reports detailing advertising campaign

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EVIDENCE GUIDE	
	activities and project plans • demonstration of project management techniques to develop an advertising campaign • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations and execution of campaign plans • oral or written questioning to assess knowledge of principles and purposes of advertising, consumer behaviour and influences on buyer behaviour • review of advertising budget and advertising schedule.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBADV604B Execute an advertising campaign • BSBADV605B Evaluate campaign effectiveness.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Objectives for the advertising campaign may include:	• changing attitudes • increasing awareness of a product, service, brand or idea • increasing knowledge about a product or service • increasing response to a product or service from a particular demographic group • reinforce positive disposition to a brand
Factors which may affect consumer responses may include:	• affluency • age • culture

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RANGE STATEMENT	
	• disability • gender • lifestyle • marital status • values

Legal and ethical requirements may include:	• codes of practice such as those issued by:
	  • Advertising Federation of Australia
	  • Australian Communications and Media Authority
	  • Australian Competition and Consumer Commission
	  • Australian Performing Right Association
	  • Commercial Radio Australia
	  • Free TV Australia
	• cultural expectations and influences
	• ethical principles
	• legislation
	• policies and guidelines
	• regulations
	• social responsibilities such as protection of children, environmental issues
	• societal expectations

Research resource requirements may include:	• attitude surveys • desktop research • experiments or market testing on a segment of the market • group interviews • indirect research such as depth or focus group interviews, projective questioning, association tests • interviews (face-to-face and telephone) • observation • panel research • questionnaires • quota sampling • retail audits (to determine brand share) • sampling • specialised research such as 'mystery shoppers' • surveys
Media options may include:	• aerial advertising

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RANGE STATEMENT	
	• billboards • cable and satellite television • cinema • direct mail • direct response • exhibitions and trade fairs • podcast • point-of-sale • radio • sales literature • sales promotion • sponsorship • television • the press • video • video games • videotext
Creative and production services may include:	• artist/illustrator • camera person • copywriter • director • film maker • graphic designer • lighting technician • musicians • performers • photographer • presenter • printer • producer • sound technician • special effects practitioner • stunt people • voice over

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Advertising

Co-requisite units

Co-requisite units		

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BSBADV603B Manage advertising production

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan, direct, monitor and evaluate the production of electronic and print advertising. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a senior advertising management, advertising production or account management role within an advertising or media organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan the production process for advertisements	1.1. Confirm the timing and budgetary requirements for creative and production work 1.2. Assess the creative brief and identify ***factors that influence the production process*** 1.3. Investigate and determine ***production processes*** to suit the advertising brief, creative work and the advertising medium 1.4. Determine the ***specifications*** to suit both the advertisement and production process 1.5. Schedule ***pre-production work*** to meet production and post-production requirements 1.6. Plan a ***production schedule*** to meet the requirements of the advertising brief and ***media*** plan
2. Evaluate and select suppliers	2.1. Identify suppliers for each element in the production process 2.2. Assess suppliers in terms of their expertise and capacity to meet production, budget and schedule requirements 2.3. Base choice of suppliers on merit and value for money and their capacity to meet legal and ethical requirements 2.4. Brief and gain agreement from suppliers on the production, schedule and process requirements

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ELEMENT	PERFORMANCE CRITERIA
3. Direct the advertising production process	3.1. Integrate the management of all aspects of the production process to meet the requirements of the advertising brief and schedule 3.2. Involve creative specialists in the production process to solve creative problems and to advise on creative changes to ensure the resulting advertisement is consistent with the objectives and positioning for the product or service 3.3. Ensure the outputs from the production process meet the requirements of the production schedule, creative brief and media plan and meet ***legal and ethical requirements***
4. Evaluate advertising production	4.1. Evaluate the quality and cost-effectiveness of the production processes and report against the requirements of the creative brief 4.2. Ensure evaluation processes are valid and measure quality against the standards established in the creative brief 4.3. Evaluate the final advertisement in relation to the requirements of the creative brief

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to question, clarify and report when managing advertising production • literacy skills to interpret production requirements and supplier profiles • numeracy skills to develop budgets and schedules • organisational and time management skills to prepare a production plan • project management skills to direct and monitor suppliers • technology skills to operate office and production equipment used in development of advertisements.
Required knowledge
• organisational budget, product and/or services • contents of the advertising and creative briefs, and media plans

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REQUIRED SKILLS AND KNOWLEDGE

• printing, television, film and video production process
• legal and ethical requirements of the advertising industry
• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • anti-discrimination legislation
  • consumer protection laws
  • copyright legislation
• ethical principles
• fair trading laws
  • privacy laws
  • Trades Practices Act
• how to use software and operate equipment used in advertising production processes.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• planning, directing, monitoring and evaluating the production of at least two advertisements, including:
	  • one electronic advertisement
	  • one print advertisement.

Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to production facilities • access to advertising and creative briefs, and media plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples

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EVIDENCE GUIDE	
	are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of reports detailing production activities • demonstration of production techniques to develop a print and electronic advertisement • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of advertisements produced • oral or written questioning to assess knowledge of advertising and creative briefs, and media plans • review of evaluation of final advertisement in relation to the requirements of the creative brief.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other advertising units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Factors that influence the production process may include:	• budget • central idea • creative concept • image factors • timeframe

Production processes may include:	• print production processes such as:
	  • computer software programs
	  • desktop publishing
	  • flexography
	  • inkjet printing

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RANGE STATEMENT	
	• letterpress • offset lithography • pre-print production processes • rotogravure • silk screen • electronic production processes such as: • film • live recording • podcasting • sound recording • streaming • video • websites
Specifications may include:	• art reproduction • aspect ratio • colour register/s • colour reproduction: • colour separation • composition • computerised colour reproduction • film • halftones • line art • photography • process colour • screens • spot colour • typesetting • video
Media may include:	• cinema • internet • out of home • radio • television
Pre-production work may include:	• receipt and review of advertising copy • receipt of visual elements and layout • rehearsals • scripts • set construction

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RANGE STATEMENT	
	• storyboards
Production schedule may include:	• film or video shooting • pre-production work • production work • post-production work • sound recording

Legal and ethical requirements may include:	• codes of practice such as those issued by:
	  • Advertising Federation of Australia
	  • Australian Communications and Media Authority
	  • Australian Competition and Consumer Commission
	  • Australian Performing Right Association
	  • Commercial Radio Australia
	  • Free TV Australia
	• cultural expectations and influences
	• ethical principles
	• legislation
	• policies and guidelines
	• regulations
	• social responsibilities such as protection of children, environmental issues
	• societal expectations

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Advertising

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Co-requisite units

Co-requisite units		

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BSBADV604B Execute an advertising campaign

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to coordinate and monitor the implementation of an advertising campaign. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a senior advertising management or account management role within an advertising or media organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop an implementation strategy	1.1. Analyse the creative brief and media plan, and determine factors affecting implementation of the campaign 1.2. Ensure the strategy outlines implementation tasks and timelines, and includes a contingency plan for dealing with omissions and errors
2. Negotiate media contracts	2.1. Confirm the media plan and budget for implementation with the client 2.2. Negotiate ***advertisement positions*** and ***price*** with each media vehicle in accordance with the client's requirements 2.3. Negotiate and agree on ***contingency factors*** and solutions with the media representative 2.4. Establish media contracts that meet legal and ethical requirements, and the requirements of the advertising campaign brief and schedule
3. Monitor the advertising campaign	3.1. Evaluate media performance against the conditions of the contract, and identify and analyse any variations 3.2. Apply the provisions of media ***guarantees*** and make adjustments to media schedules if necessary 3.3. Execute the advertising campaign so that it complies with the advertising schedule and budget and meets

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ELEMENT	PERFORMANCE CRITERIA
	legal and ethical requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to interpret media requirements and contracts
- negotiation skills to agree on advertising price and positions
- numeracy skills to develop budgets and schedules
- project management skills to manage and monitor contracts
- communication skills to question, clarify and report when implementing an advertising campaign.

Required knowledge

- principles of media pricing policies, guarantees and campaign contingencies
- media vehicles and media options
- organisational budget, product and/or services
- principles of advertising, creative briefs and media plans
- printing, television, film and video production processes
- legal and ethical requirements relating to the advertising industry
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - consumer protection laws
  - copyright legislation
- ethical principles
- fair trading laws
  - privacy laws
  - Trades Practices Act.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of at least one advertising campaign implementation strategy • negotiations with media representatives to get price and positions for at least one advertising campaign • evaluation of media performance against contractual obligations for at least one advertising campaign.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual or simulated workplace environment • access to office equipment and resources • access to media and advertising plans, campaign contracts, creative briefs, campaign briefs.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of reports detailing campaign execution activities • demonstration of negotiation and monitoring techniques for an advertising campaign • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of campaign performance • oral or written questioning to assess knowledge of principles of advertising, creative briefs and media plans • review of media contracts negotiated.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBADV605B Evaluate campaign effectiveness.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Advertisement positions may include:	• above or below the fold • EGN • evenly spread during the time schedule • fixed position each week in a radio/television or other program • left or right page • page number • scatter plan which places an advertisement in different programs or positions each week
Price may include:	• buying incentives • concessions • discounts • guarantees • negotiation
Contingency factors may include:	• programming errors • technical errors
Guarantees may include:	• frequency • position • price

Legal and ethical requirements may include:	• codes of practice such as those issued by:
	  • Advertising Federation of Australia
	  • Australian Communications and Media Authority
	  • Australian Competition and Consumer Commission
	  • Australian Performing Right Association
	  • Commercial Radio Australia
	  • Free TV Australia
	• cultural expectations and influences
	• ethical principles

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RANGE STATEMENT	
	• legislation • policies and guidelines • regulations • social responsibilities such as protection of children, environmental issues • societal expectations

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Advertising

Co-requisite units

Co-requisite units		

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BSBADV605B Evaluate campaign effectiveness

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and implement a campaign evaluation strategy to determine whether advertising objectives have been attained. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a senior advertising management or account management role within an advertising or media organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop a campaign evaluation strategy	1.1. Ensure the evaluation strategy defines standards and ***measurements*** by which the effectiveness of the advertising can be measured and improvements identified 1.2. Establish a strategy which contains specific performance standards for each ***element of the advertising campaign*** as well as the overall outcome 1.3. Ensure the strategy includes the evaluation of the ***legal and ethical standards*** acceptable for the advertisement/s 1.4. Include processes in the strategy for correcting advertisement/s that do not meet legal and ethical standards
2. Implement campaign evaluation strategy	2.1. Evaluate expenditure data to determine effectiveness of the campaign in relation to the budget 2.2. Evaluate the media program to determine performance against the media plan objectives 2.3. Evaluate the creative strategy in terms of copy content, creative execution and effectiveness of the finished advertisement 2.4. Evaluate the interactive effect of all the elements in the advertising campaign to determine the overall effectiveness of the advertising campaign
3. Utilise advertising	3.1. Use the results of evaluations of advertising

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ELEMENT	PERFORMANCE CRITERIA
effectiveness data	effectiveness in the analysis and planning phase for subsequent advertising 3.2. Use expenditure information to improve the budget planning process 3.3. Use feedback on the advertisement itself to provide ideas for future advertisements and to improve advertising copy 3.4. Use media performance information to determine whether alternative media approaches would yield better results 3.5. Use differences between planned and actual accomplishments to define problems to be addressed in the next planning phase

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to question, clarify and report
- literacy skills to interpret evaluation requirements, legal and ethical requirements
- numeracy skills to analyse numerical and other data, and to draw conclusions
- research and evaluation skills to determine effectiveness of advertising campaigns
- technology skills to use a range of office equipment and software.

Required knowledge

- organisational budget planning process
- techniques for evaluating advertising effectiveness and managing campaign contingencies
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - consumer protection laws
  - copyright legislation
- ethical principles
- fair trading laws
  - privacy laws

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REQUIRED SKILLS AND KNOWLEDGE
• Trades Practices Act • specifications in advertising, creative and media briefs.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development and implementation of a campaign evaluation strategy for at least one advertising campaign • analysis of evaluation data to make recommendations for improvement on future campaigns.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to advertising, creative and media briefs, and media plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of reports detailing campaign evaluation activities • demonstration of evaluation techniques for an advertising campaign • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of campaign performance • oral or written questioning to assess knowledge of techniques for evaluating advertising effectiveness

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EVIDENCE GUIDE	
	and managing campaign contingencies • review of problems defined to be addressed in the next planning phase.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBADV602B Develop an advertising campaign • BSBADV604B Execute an advertising campaign.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Measurements may include:	• affective tests • awareness studies • cognitive tests • conative tests • consumer juries • consumer take-away • controlled store testing • headline testing • inquiry measurement • physiological tests • ratings • readership tests • recall tests • related recall • retail audit • sales analysis • simulated test market (STM) • split cable testing • split scan system • split-run tests

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RANGE STATEMENT	
	• theatre tests • tracking study
Elements of the advertising campaign may include:	• campaign launch • creative materials • expenditure against budget • finished advertisement • purchase of advertising media • research

Legal and ethical standards may include:	• codes of practice such as those issued by:
	  • Advertising Federation of Australia
	  • Australian Communications and Media Authority
	  • Australian Competition and Consumer Commission
	  • Australian Performing Right Association
	  • Commercial Radio Australia
	  • Free TV Australia
	• cultural expectations and influences
	• ethical principles
	• legislation
	• policies and guidelines
	• regulations
	• social responsibilities such as protection of children, environmental issues
	• societal expectations
	• standards relating to:
	  • children
	  • comparative advertising
	  • culturally diverse groups
	  • linguistically diverse groups
	  • subliminal advertising
	  • the use of sex in advertising
	  • truth in advertising
	  • women

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Advertising

Co-requisite units

Co-requisite units		

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BSBATSIC411C Communicate with the community

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required for board members to work in partnership with the community, including other organisations, in order to meet community needs and involve people in the organisation and its activities. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who need to communicate with the community in their role as a member of a board of governance of an Aboriginal and Torres Strait Islander organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Collect information from the community	1.1. Convene a ***community forum*** 1.2. Use formal and informal community networks to share information 1.3. Encourage, respect and record community contributions 1.4. Follow organisational policies and procedures for confidential information
2. Provide information to the community about the organisation's activities and board decisions	2.1. Provide information to the community about the organisation's activities according to established ***protocols*** 2.2. ***Advise the community*** regularly of board decisions and the reasons behind them
3. Identify issues jointly with the community	3.1. Raise and discuss issues of importance with the community 3.2. Invite ***individuals and groups*** affected by issues to participate in community forums 3.3. Gather background information through relevant networks
4. Identify options with the community	4.1. Discuss and evaluate options for action with the community 4.2. Identify preferred options 4.3. Convey information on issues and preferred options

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ELEMENT	PERFORMANCE CRITERIA
	to the board 4.4. Convey the board's response to the community

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication and teamwork skills to:
  • work cooperatively with community members, other board members, staff and key stakeholders
  • ensure the views of all relevant members of the community are heard and treated with respect
• culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
• evaluation and decision-making skills to review and assess information
• facilitation skills to assist the community to voice opinions and evaluate options
• networking skills to encourage participation in meetings and keep the community informed
• problem-solving skills to identify and manage potential areas of conflict
• skills required to convey information to the board and the community

Required knowledge
• community consultation methods • concept of community control of organisations and how it may impact on the need to communicate with the community • cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that can impact on methods of communication with the community • effective communication strategies for sharing information with individuals and groups • geographic,social, economic and political contexts in which particular organisations operate and how these may impact on communication methods • information gathering, analysis and presentation methods • organisationalpolicies and procedures in relation to communicating with community and maintaining confidentiality of information • relevant protocols and cultural responsibilities when communicating with community

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • effectively communicate with the community • gather information from community consultations • present information in an appropriate format for the community.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of issues considered by boards of governance, including community feedback • access to examples of relevant documents • knowledge and performance are assessed over time to confirm consistency in performance • participation on an actual or simulated board.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of feedback from the community and stakeholders about performance • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with reflection of on-the-job board performance by the candidate • observation of performance on a board or simulated board • observation of performance at a community meeting or simulated community meeting • observation of performance in role plays • observation of presentations and group discussions • oral or written questioning to assess knowledge.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is

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EVIDENCE GUIDE	
	recommended, for example: • BSBATSIM416A Oversee organisational planning • BSBRES401A Analyse and present research information.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Community forums:	• may include:
	  • community meetings
	  • focus groups
	  • open house
	  • social events
	  • workshops
	• may involve:
	  • external stakeholders
	  • particular groups within the community
	  • specific or specialised expertise
	  • the whole community.

Protocols for information sharing may relate to:	• confidentiality and privacy • gender issues • land matters.
Methods of ***advising the community*** may include:	• community meetings • community noticeboards • consultations • forums • networks • newsletters, notices and other documents presented in a way that will be understood by the community • open board meetings

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RANGE STATEMENT	
	• open days • site visits.
Individuals and groups may include:	• Elders • traditional owners • government departments • individuals and groups representing other organisations and networks within the community • women • young people.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIC412A Maintain and protect cultural values in the organisation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to work as a board member in such a way as to respect, maintain and protect aspects of culture within the organisation. The unit is based on a unit originally developed by the Aboriginal and Torres Strait Islander Curriculum Consortium, Tropical North Queensland Institute of TAFE. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals responsible for maintaining and protecting cultural values in an organisation as part of their board role in monitoring and guiding the activities of Aboriginal and Torres Strait Islander organisations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Demonstrate knowledge of your culture	1.1. Outline ***relevant traditional and cultural responsibilities*** in a manner appropriate to the audience 1.2. Follow accepted cultural ***protocols*** when undertaking board duties 1.3. Identify the role of Elders and their relationship to the organisation
2. Demonstrate respect for cultural diversity	2.1. Treat individuals and groups with diverse ***lifestyles***, backgrounds, ***cultures*** and languages with respect and sensitivity 2.2. Accommodate cultural differences in dealings with other people
3. Identify the impacts of colonisation on Aboriginal and Torres Strait Islander culture	3.1. Identify how changes in Aboriginal and Torres Strait Islander culture since colonisation impact on the organisation and its members today 3.2. Recommend ways in which the organisation can help to restore, protect and maintain culture

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ELEMENT	PERFORMANCE CRITERIA
4. Apply Aboriginal and Torres Strait Islander cultural practices to governance processes	4.1. Identify relevant ***Aboriginal and Torres Strait Islander cultural practices*** that contribute to effective governance of organisations 4.2. Work with other board members to incorporate relevant Aboriginal and Torres Strait Islander cultural practices into the organisation's governance processes
5. Deal with potential and actual cultural exploitation	5.1. Identify examples of ***potential and actual harm*** 5.2. Work with other board members to develop strategies for responding to potential and actual damage to cultural integrity
6. Deal with potential and actual stereotyping and prejudice	6.1. Identify ***areas of potential and actual social conflict*** as a consequence of stereotyping and prejudice 6.2. Work with other board members to develop strategies toward reconciliation in consultation with ***appropriate individuals or groups*** in targeted areas
7. Determine the effects of new legislation and policy on the organisation	7.1. Assess the potential ***impact*** of new and proposed ***legislation and policy*** on the organisation and its members 7.2. Develop strategies to respond to new and proposed legislation and policy
8. Determine the impact of development on culture	8.1. Identify ***relevant social***, ***technical***, ***economic and political changes*** that may impact on the activities of the organisation 8.2. Assess current and future impact of development on culture 8.3. Develop strategies to maximise positive impact and prevent or minimise negative impact on culture

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analysis and evaluation skills to assess key changes in legislation and policy and how they relate to the organisation and community • culturally appropriate communication skills to relate to people from diverse

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REQUIRED SKILLS AND KNOWLEDGE
backgrounds and with diverse abilities • oral, diagrammatic or written literacy skills to be able to gather and share information • problem-solving and decision-making skills to develop strategies to address cultural issues
Required knowledge
• Aboriginal and Torres Strait Islander cultural governance practices that may affect the effective governance of organisations • basic information on intellectual property rights and copyright law in relation to cultural knowledge and objects • concept of community control of organisations and how it may impact on the protection of cultural values • concepts of stereotyping and prejudice and their impacts on individuals • cultural context in which Aboriginal and Torres Strait Islander boards operate • current and proposed changes in legislation and policy that could impact on the organisation • geographic, social, economic and political contexts in which particular organisations operate and how these may impact on the maintenance and protection of cultural values in an organisation • how historical factors, such as colonisation, have had an impact on local community members and the organisation • provisions of federal, state or territory legislation and funding body requirements that may impact on decision making • relevant protocols and cultural responsibilities • social, technical, economic and political changes likely to occur in the short to medium term that could have an impact on the activities of the organisation

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • provide appropriate information to others about cultural protocols and responsibilities relevant to

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EVIDENCE GUIDE	
	board duties • identify historical factors that may impact on the community and the organisation • develop strategies to restore, protect and maintain cultural values in the organisation.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of legislation and policy affecting Aboriginal and Torres Strait Islander people and their culture • knowledge and performance are assessed over time to confirm consistency in performance. Note: This unit contains skills and knowledge specific to Aboriginal and Torres Strait Islander culture. Particular care should be taken when choosing an appropriately qualified and suitable person or persons to conduct this assessment. Where appropriate, this may require involving a respected community member to assist with assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of feedback from the community and stakeholders • analysis of responses to case studies and scenarios • direct questioning combined with reflection of practical board performance by the candidate • observation of performance on a board or simulated board • observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant traditional and cultural responsibilities may include:	• Aboriginal and Torres Strait Islander lore • kinship • land ownership • men's and women's business • relationships with Elders and traditional owners • responsibilities in relation to significant events, such as births, marriages and deaths.
Protocols may include:	• acknowledgements • appropriate time, place or ceremony for communication • family, kinship and clan • land ownership • talking to the right people • welcomes.
Lifestyles may include:	• remote • rural • traditional • urban.
Cultural diversity may include:	• beliefs and values • ceremonies • employment • language • law and lore • lifestyles • literacy • living conditions.
Aboriginal and Torres Strait Islander cultural practices may include:	• bush meetings • committee meetings in appropriate language • constitutions recognising traditional owners • decision-making processes.
Potential and actual harm may	• copyright issues

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RANGE STATEMENT	
include:	• shift from community focus to business focus.
Areas of potential and actual social conflict may include:	• family • land • public spaces • schools • workplaces.
Appropriate individuals or groups may include:	• businesses • church groups • community sector organisations • community leaders • local government • schools • sporting clubs.
Impact may include:	• changes in employment opportunities • changes in educational opportunities • changes in land ownership and control • financial changes.
Legislation and policy may include:	• anti-discrimination and equal opportunity laws • extended trading hours • Native Title • pastoral and mining leases • relevant social security law • 'Three Strikes' laws.
Relevant social, ***technical***, ***economic and political changes*** may include:	• changing technologies • education • land developments • land ownership changes • living standards • mainstreaming services.

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIC511A Plan and conduct a community meeting

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan and conduct community meetings that the board initiates or facilitates. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who need to communicate with community members in their role of monitoring and guiding the activities of the organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Negotiate the basis of a meeting and plan the event	1.1. Undertake consultation on the purpose, location, date and time of the proposed meeting with ***appropriate people***
	1.2. Develop a broad agenda and list of ***invited guests*** in consultation with appropriate people
	1.3. ***Communicate*** details of the meeting to the community, invited guests and other key people and groups
	1.4. Plan transport and other arrangements to maximise attendance
	1.5. Address the requirements of people with ***special needs*** to ensure equity and access
2. Conduct the meeting	2.1. Follow community procedures for choosing a chairperson for the meeting
	2.2. Follow the agenda and relevant meeting ***protocols***
	2.3. Acknowledge all points of view through appropriate ***meeting processes*** of discussion and documentation
	2.4. Encourage full participation
	2.5. Seek consensus in decision making
	2.6. Manage ***difficult situations*** appropriately
3. Record decisions	3.1. Clearly outline meeting decisions being voted on to those present
	3.2. Clarify recommended actions resulting from

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ELEMENT	PERFORMANCE CRITERIA
	decisions with participants 3.3. Identify people and organisations responsible for actions 3.4. Record decisions and recommended actions
4. Communicate outcomes	4.1. Share meeting outcomes with board, members and relevant others 4.2. Encourage participants to use their networks to communicate information provided and decisions made at the meeting 4.3. Follow up people and organisations identified as responsible for actions to ensure they understand what is required 4.4. Report outcomes to participating Elders, community members and organisations through established channels

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication, teamwork and negotiation skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- leadership and networking skills to encourage participation and ensure meeting effectiveness
- negotiation and conflict-management skills to handle differences of opinion
- planning skills to increase participation and ensure protocols are followed
- facilitation and public-speaking skills to manage the meeting, present ideas and communicate effectively with the audience

Required knowledge

- community consultation methods
- concept of community control of organisations and how it may impact on the conduct of community meetings
- consensus decision-making principles

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REQUIRED SKILLS AND KNOWLEDGE
• cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact on the conduct of community meetings • decision-making strategies • geographic, social, economic and political contexts in which particular organisations operate and how these may impact on the conduct of community meetings • organisationalpolicies and procedures relevant to community meetings • provisions of federal, state or territory legislation and funding body requirements that influence decisionmaking • relevant community bodies that might be included in community meetings • relevant protocols and cultural responsibilities in relation to conducting community meetings

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • plan a community meeting to ensure participation of appropriate people • conduct a community meeting that provides participants with an opportunity to share views • put in place processes to inform appropriate people about what occurred at the meeting and the outcomes of proposed action.
Context of and specific resources for assessment	Assessment must ensure: • participation in an actual or simulated community meeting • access to examples of issues raised at community meetings • meeting participants • knowledge and performance are assessed over time to confirm consistency in performance.

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance in a community meeting or simulated community meeting • direct questioning combined with reflection of practical performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays • analysis of feedback from other board members, staff, community or other stakeholders regarding performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIL512A Be a leader in the community.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Appropriate people may include:	• Elders • managers • members • staff • traditional owners.
Invited guests may include:	• Elders • government representatives • land councils • members

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RANGE STATEMENT	
	• representatives of local businesses • representatives of other Aboriginal and Torres Strait Islander organisations or communities • staff • traditional owners.
Communication may include:	• email • facsimile • notices • networks • posters • telephone • word of mouth.
Special needs may relate to:	• arrangements for people with disabilities • child care • cultural brokers • interpreters • transport.
Protocols may include:	• agenda formats • introductions, welcomes and acknowledgements • land, gender and clan issues • meeting procedures • minute taking • order of speakers.
Meeting processes may include:	• decision-making processes • forms of discussion • gender groups • language.
Difficult situations may include:	• conflict • impasse in decision making • organisational problems.

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIL408C Manage a board meeting

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan for and conduct a regular board meeting and ensure outcomes of the meeting are implemented. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who need to conduct board meetings in their role of monitoring and guiding the activities of Aboriginal and Torres Strait Islander organisations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan a board meeting	1.1. Identify ***type of meeting*** to be conducted and any rules, ***cultural protocols***, policies and procedures that affect its planning and conduct 1.2. Prepare an agenda that reflects the business of the meeting, with consultation between the chair, secretary and manager 1.3. Determine the date, time and location of the meeting taking into consideration all relevant rules, cultural protocols, policies and procedures 1.4. Issue invitations to members and ***guests*** in a timely manner that will maximise attendance 1.5. Plan and implement transport and other arrangements to maximise attendance 1.6. Circulate background papers prior to the meeting in an appropriate form and with adequate time for members to prepare for the meeting
2. Conduct a board meeting	2.1. Ensure a quorum is present before commencing meeting 2.2. Follow ***rules*** and cultural protocols 2.3. Follow meeting agenda and timeframes 2.4. Provide opportunities for participants to listen and speak, and show respect for different views 2.5. Manage difficult situations that arise in a respectful

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ELEMENT	PERFORMANCE CRITERIA
	and sensitive manner 2.6. Use agreed ***decision-making processes*** to ensure decisions reflect participants' views 2.7. Develop an ***action plan*** to implement decisions
3. Identify confidential business	3.1. Advise board members when to observe ***required confidentiality*** 3.2. Seek declarations of potential and real conflict of interest
4. Ensure minutes are taken	4.1. Appoint a minute taker 4.2. Review minutes to ensure they contain ***required information*** 4.3. Approve minutes and provide them to members and guests as appropriate 4.4. Ensure procedures are in place to store minutes adequately and with appropriate access
5. Monitor the implementation of decisions	5.1. Communicate decisions to ***relevant people*** 5.2. Monitor the action plan to ensure completion 5.3. Present ***reports of outcomes*** of implementation at board meetings

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication, teamwork and negotiation skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders • culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities • delegation skills to identify appropriate people to take minutes and implement action plans • evaluation and decision-making skills to monitor and review information presented to the board and enact decisions • leadership skills to ensure the meeting remains on track and participants contribute to discussions and have their views treated with respect by others • problem-solving skills to identify and manage potential and real conflict of interest

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REQUIRED SKILLS AND KNOWLEDGE
between parties • planning and organisational skills to prepare for the meeting
Required knowledge
• board meeting procedures, including documentation requirements • board member roles and responsibilities • concept of community control of organisations and how it may impact on conduct of meetings • conflict of interest • constitution provisions regarding conduct of meetings • cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that can impact on the conduct of meetings • cultural processes and protocols relevant to the conduct of meetings • decision-making processes • geographic, social, economic and political contexts in which particular organisations operate and how these may impact on the conduct of meetings • organisational policies and procedures relevant to the conduct of meetings • provisions of federal, state or territory legislation and funding body requirements that influence board decisionmaking

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • apply constitutional provisions relating to the planning and conduct of board meetings • plan for a meeting to maximise its effectiveness • prepare and follow the meeting agenda.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of issues worked with by boards of governance

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EVIDENCE GUIDE	
	• access to examples of relevant documents • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays • analysis of feedback from the community and stakeholders about operations.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIL411A Undertake the roles and responsibilities of a board member • BSBATSIL413AReview and apply the constitution.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Type of meeting may include:	• annual general meeting • regular board meeting • special general meeting • subcommittee meeting.

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RANGE STATEMENT	
Cultural protocols may include:	• acknowledgement • men's and women's business • order of speaking • providing interpreters • role of Elders • subject matters for discussion • welcome to country.
Guests may include:	• community members • Elders • government representatives • representatives of other organisations • traditional owners.
Rules may include:	• constitution requirements • cultural protocols • meeting procedures • organisational policy.
Decision-making processes may include:	• consensus • decision by authority • decision by majority.
Action plan may include:	• who does what • when it is to be done • what is to be achieved • what is to be reported back.
Required confidentiality may include:	• commercial in confidence • financial • legal • personal.
Required information may include:	• meeting date, time and location • apologies • people present • items discussed • details of discussion • motions • mover and seconder • votes • decisions made • action plans • who is responsible • time meeting closed

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RANGE STATEMENT	
	• next meeting date.
Relevant people may include:	• board members • community members • committees • funding bodies • partner organisations • staff • visitors.
Reports of outcomes may include:	• evaluation reports • information reports • progress reports • research reports.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIL411A Undertake the roles and responsibilities of a board member

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to meet the diverse roles and responsibilities of a board member. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals responsible for monitoring and guiding the activities of Aboriginal and Torres Strait Islander organisations in their role as a member of a board of governance.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Work within the structure of the organisation	1.1. Identify ***core functions*** and ***structure*** of the organisation 1.2. Describe the relationship between organisation, ***stakeholders and other organisations or entities*** 1.3. Identify individual responsibilities of board members 1.4. Perform designated board duties as per role description 1.5. Follow the board's decision-making processes
2. Manage competing roles and responsibilities	2.1. Identify the differences between the roles of governance and management 2.2. Identify the ***relationship between board and staff*** and ***overlapping roles*** 2.3. Identify and manage real and perceived ***conflict of interest*** due to ***competing roles and responsibilities*** 2.4. Follow policies and procedures regarding the confidentiality of information
3. Follow legal requirements when carrying out board duties	3.1. Identify the ***legislation*** under which the organisation operates 3.2. Apply provisions of the legislation that are relevant to the governance of the organisation 3.3. Comply with relevant aspects of ***corporation law*** and terms and conditions of funding agreements

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Adhere to the constitution of the organisation while undertaking ***workplace responsibilities***
4. Monitor operations	4.1. ***Monitor trends and outcomes*** in the community 4.2. Identify and analyse outcomes for each operational area 4.3. Use ***information*** provided to review effectiveness and efficiency of operations and associated policy 4.4. Suggest changes to operations or policy if necessary
5. Receive and act on community and stakeholder feedback	5.1. Gather and evaluate feedback from the community and stakeholders about the operations of the organisation, and share with other board members 5.2. Deal with feedback according to policies and procedures, and in consultation with management 5.3. Support decisions of the board and management where applicable

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and teamwork skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- evaluation and decision-making skills to monitor and review information presented to the board and enact decisions
- problem-solving skills to identify and manage real and perceived conflict of interest between parties
- self-management skills to:
  - manage situations where there may be conflict of interest
  - adhere to role requirements and workplace policies and procedures

Required knowledge

- concept of community control of organisations, and how it may impact on the roles and responsibilities of board members
- cultural context in which Aboriginal and Torres Strait Islander boards operate,

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REQUIRED SKILLS AND KNOWLEDGE
including their role in upholding traditional and cultural values, and how this may impact on the roles and responsibilities of board members • decision-making processes • geographic, social, economic and political contexts in which particular organisations operate, and how these may impact on the roles and responsibilities of board members • governance roles and responsibilities • management roles and responsibilities • organisational history, structure, core functions, code of conduct, constitution, policies and procedures, and reporting processes • provisions of federal, state or territory legislation and funding body requirements that influence decisionmaking, and how these may impact on the roles and responsibilities of board members • relevant protocols and cultural responsibilities, and how they may impact on the roles and responsibilities of board members • roles and responsibilities of key board positions • terms and conditions of funding agreements

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • contribute to analysis and decisionmaking on issues affecting board and organisational performance • understand the relationship and differences between boards of governance and organisational management • work in accordance with organisational constitution, codes of conduct, functions, policies and procedures • work with irregularities and breakdowns in communication and routines between board members and/or organisational management.
Context of and specific resources for assessment	Assessment must ensure:

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EVIDENCE GUIDE	
	• participation on an actual or simulated board • access to examples of issues that boards of governance have worked on, including community feedback and strategic decisions • access to examples of relevant documents • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays • analysis of feedback from the community and stakeholders relating to operations.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIL408C Manage a board meeting • BSBATSIL413AReview and apply the constitution.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Core functions may include:	• provision of specific goods, such as catering, art work, performance, and general goods • provision of specific services, such as housing,

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RANGE STATEMENT	
	health, employment, child care, legal services, aged care, creative arts, youth services, bookkeeping, resourcing, and coordination • specific cultural contexts, such as traditional and cultural knowledge and values.
Structure may relate to:	• board member portfolios of responsibility • divisions, branches, departments, teams and positions within the organisation • lines of accountability.
Stakeholders and other organisations or entities may include:	• clients, consumers and participants • commercial businesses owned by the organisation • individual community members • community groups, organisations and networks • competitors • Elders • jointly owned entities held by other organisations • local, state or territory, and federal government departments • members • related Aboriginal and Torres Strait Islander organisations • related non-Aboriginal and Torres Strait Islander organisations • traditional owners • trusts held by the organisation.
Relationship between board and staff may relate to:	• board leadership • board planning • day-to-day administration • management responsiveness • policy formulation and decision making.
Overlapping roles may include:	• board members becoming involved in day-to-day operations • staff who are also board members.
Conflict of interest may be managed by:	• discussion and resolution at board meetings • guidelines for declaring and managing conflict of interest.
Competing roles and responsibilities may relate to:	• board and staff • business interests • family relationships and responsibilities • financial interests

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RANGE STATEMENT	
	• governance and management • representing the interests of a specific group and representing the interests of the whole organisation.
Legislation may include:	• Corporations (Aboriginal and Torres Strait Islander) Act 2006 • corporation law • Fair Work Act and Regulations 2009 • federal, state and territory Acts relating to core functions of the organisation • federal, state and territory occupational health and safety statutes • financial legislation and regulations • state and territory associations Acts.
Corporation law may include:	• Corporations (Aboriginal and Torres Strait Islander) Act 2006 • liabilities of board members • responsibilities of board members • state and territory associations Acts.
Workplace responsibilities may include:	• code of conduct • anti-discrimination • equal opportunity • occupational health and safety • staff contracts.
Monitoring trends and outcomes may include:	• attending community meetings • gathering information, data and statistics • identifying community needs • maintaining awareness of political issues.
Information may include:	• anecdotal information from the community • data and statistics • financial reports • reports from staff, consultants, and other bodies.

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIL412A Participate effectively as a board member

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to operate as a confident and responsible member of the board, respecting culture, contributing positively, working with others, seeing the big picture and managing personal stress. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of the business or core functions of organisations, who contribute their skills and knowledge to monitoring and guiding the activities of the organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Act in accordance with culture and professional boundaries	1.1. Demonstrate respect for ***local history*** 1.2. Identify and follow ***community protocols*** 1.3. Adhere to personal ***legal responsibilities under corporation law*** 1.4. Follow the organisation's ***code of conduct*** 1.5. Identify and manage real and perceived conflict of interest
2. Participate actively in board matters	2.1. Plan for participation in board activities 2.2. Attend board meetings and other board activities regularly 2.3. Make positive and constructive contributions to discussions 2.4. Prepare for meetings and undertake assigned follow-up actions
3. Encourage and respect contributions from others	3.1. Listen to and consider others' points of view 3.2. Represent the community's views objectively 3.3. Seek consensus when decision making
4. Work with the wider community	4.1. Keep up-to-date with ***local Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander issues*** 4.2. Identify and undertake cooperative actions involving ***other groups***

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ELEMENT	PERFORMANCE CRITERIA
	4.3. Demonstrate respect for the values, policies and processes of other groups
5. Manage stress	5.1. Recognise signs of stress in self and others 5.2. Identify potential and actual sources of stress 5.3. Implement stress-reduction strategies if required 5.4. Evaluate the effectiveness of stress-reduction strategies and make changes if required

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- teamwork skills to:
  - work with others
  - participate in discussions and decision making
- communication skills to ensure culturally appropriate communication takes place in meeting environments
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- evaluation and decision-making skills
- listening and speaking skills to participate effectively in discussions
- self-management skills to implement stress-management strategies when required
- time-management skills to organise time effectively in order to maximise effectiveness as a board member

Required knowledge

- key historical events of significance to the local community
- code of conduct and organisational policies and procedures with regard to participation in board activities
- provisions of relevant corporation law that relate to personal responsibilities as a board member
- how to identify real and potential conflict of interest, and procedures to follow if these exist
- relevant protocols and cultural responsibilities that impact on performance as a board member
- rules of the constitution

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REQUIRED SKILLS AND KNOWLEDGE
• sources and signs of stress and stress-management strategies • time-management strategies

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • undertake board duties according to cultural and legal responsibilities • actively contribute to board discussions and decision making • manage time and stress effectively to participate in board activities.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of codes of conduct • knowledge and performance are assessed over time to confirm consistency in performance • participation on an actual or simulated board.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with reflection of practical board performance by the candidate • observation of performance in role plays • observation of performance on a board or simulated board • observation of presentations and group discussions • oral or written questioning to assess knowledge.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

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EVIDENCE GUIDE	
	• BSBATSIC411C Communicate with the community • BSBATSIL411A Undertake the roles and responsibilities of a board member.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Local history may relate to:	• cultural diversity • defining events • economic development • Elders • traditional owners.
Community protocols may relate to:	• gender • kinship • land ownership • men's and women's business • significant events, such as birth, marriage and death • welcome to country and acknowledgements.
Legal responsibilities under corporation law may relate to:	• liabilities • responsibilities.
Code of conduct may relate to:	• declarations of conflict of interest • declarations of pecuniary interest • written or agreed organisation and/or board codes of conduct.
Local Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander issues may include:	• community tension around local issues • competing interests in land • local politics • other developments.
Other groups may include:	• Aboriginal and Torres Strait Islander

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RANGE STATEMENT	
	organisations • local businesses • local government • non-Aboriginal and Torres Strait Islander organisations.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIL413A Review and apply the constitution

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to ensure that the organisation's constitution is relevant and legal, that it is understood, and that it meets changing needs. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals responsible for monitoring, guiding and undertaking the decision-making activities of Aboriginal and Torres Strait Islander organisations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify essential components of the constitution	1.1. Explain key clauses to community members 1.2. Seek clarification of clauses from ***experts*** when required 1.3. Identify areas of activity of the organisation not covered by the constitution
2. Ensure the constitution is legal	2.1. Check the constitution to ensure it is consistent with ***relevant law*** with the support of experts where required 2.2. Check the constitution to ensure it is consistent with traditional lore
3. Apply the constitution	3.1. Follow ***constitutional provisions*** 3.2. Check ***policies and programs*** to ensure they conform to the constitution 3.3. Amend the constitution as required in consultation with members and according to relevant procedures 3.4. Ensure formal documentation of changes made is maintained

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to understand and interpret provisions of the constitution and how they can be applied in a variety of circumstances
- communication and teamwork skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- consultation and discussion skills to explain the constitution to others and workshop possible changes
- culturally appropriate communicationskills to relate to people from diverse backgrounds and with diverse abilities
- evaluation and decision-making skills to review information presented to the board and enact decisions
- oral, diagrammatic or written literacy skills to be able to gather and share information

Required knowledge

- concept of community control of organisations and how it may impact on the provisions and application of the constitution
- cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that may impact on content and application of the constitution
- federal, state or territory legislation and funding body requirements that can impact on the provisions of the constitution
- geographic, social, economic and political contexts in which particular organisations operate and how these may impact on the provisions and application of the constitution
- how to put provisions of the constitution into practice, in particular provisions about elections, membership, conduct of meetings (particularly annual general meetings) and reporting
- organisation's constitution provisions and processes
- provisions of the corporation law relevant to the organisation that directly relate to the content and development of the organisation's constitution
- sources of support to provide advice on legality and practical operations of aspects of the constitution

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • interpret and apply provisions of the constitution • obtain appropriate advice where necessary to ensure the constitution meets legal requirements • follow the constitution when undertaking board duties.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to expert knowledge and resources relevant to constitution • access to examples of constitutions used by Aboriginal and Torres Strait Islander organisations • knowledge and performance to be assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIL408C Manage a board meeting • BSBATSIL411A Undertake the roles and responsibilities of a board member.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Experts may include:	• accountants • Elders • federal or state registration bodies • managers • Office of the Registrar of Indigenous Corporations • solicitors • state registration bodies.
Relevant law may include:	• Act or Acts under which the organisation operates • corporation law.
Constitutional provisions may include:	• elections • financial and other reporting • meetings, including annual general meetings • membership • objectives.
Policies and programs may include:	• commercial activities • eligibility for assistance • program objectives.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

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Co-requisite units

Co-requisite units		

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BSBATSIL503C Manage conflict

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage conflict, both within the board and the organisation, and between the organisation and community and the wider community. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who contribute their skills and knowledge to monitoring and guiding the activities of organisations in situations where there may be conflict between individuals or groups.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify existing and potential conflict	1.1. Determine if conflict exists and its possible ***causes*** 1.2. Identify potential ***situations of future conflict*** 1.3. Develop strategies to prevent conflict
2. Consider the conflict situation	2.1. Identify the ***implications of the conflict*** occurring 2.2. Identify responsibilities within the conflict 2.3. Develop ***resolution strategies*** in consultation with the conflicting parties 2.4. Seek professional advice where needed, maintaining discretion and confidentiality 2.5. Ensure the wellbeing of individuals and the organisation is considered when developing resolution strategies
3. Use strategies to resolve conflict	3.1. Promptly, appropriately and impartially implement strategies that respect the cultures of the parties involved 3.2. Allow sufficient time for the conflict to be resolved 3.3. Monitor and evaluate the process used to resolve the conflict

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication, teamwork and negotiation skills to listen to differences of opinion and work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- evaluation, decision-making and problem-solving skills to monitor and review information presented to the board and to develop conflict-resolution strategies

Required knowledge

- concept of community control of organisations and how it may impact on how conflict is resolved
- conflict resolution theories and strategies, including mediation strategies
- cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact on how conflict is resolved
- geographic, social, economic and political contexts in which particular organisations operate and how these may impact on how conflict is resolved
- how equity and diversity principles might apply to the way conflict is resolved
- organisationalpolicies, procedures and code of conduct relevant to the conflict situation
- potential causes of conflict that board members may need to address when undertaking board duties
- professional support available to assist in conflict resolution
- provisions of federal, state or territory legislation and funding body requirements that may impact on decisions made to resolve conflict
- relevant protocols and cultural responsibilities that impact on how conflict is resolved
- provisions of the constitution relevant to the conflict situation

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • recognise causes of conflict • apply conflict-resolution strategies • manage conflicteffectively.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of issues worked with by boards of governance that have the potential to involve conflict • access to examples of relevant documents • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations and group discussions • observation of performance in role plays • analysis of feedback from the other board members, staff, community or other stakeholders regarding performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating

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RANGE STATEMENT	
conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Causes of conflict may include:	• competing group, family or personal interests or needs • cross-cultural issues • differences between cultural groups • dissatisfaction in the community • government policies • interference from outside individuals or organisations, including government • lack of communication • lack of funding • personality clashes • power and control issues • unclear roles and responsibilities.
Situations of future conflict may include:	• between the organisation and the community • between the organisation and the wider community • within the board • within the organisation.
Implications of the conflict may include:	• community divisions • breakdown in social cohesion • impacts on service delivery or business operations • individual and family health and wellbeing • legal implications, such as breach of contract, duty of care • personal actions.
Resolution strategies may include:	• codes of conduct • community and family meetings • cultural resolution strategies • grievance policy and procedure • listening and respect • mediation • memorandums of understanding.

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIL510A Appoint and work with a manager

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to appoint a manager for the organisation, define the respective roles of a manager and the board of management, and effectively work together on an ongoing basis. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are responsible for monitoring and guiding the activities of organisations that are about to appoint, or have appointed, a manager.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish a recruitment and selection process	1.1. Obtain expert advice on legal requirements relevant to ***recruiting and selecting*** staff 1.2. Identify organisational policies and procedures relevant to appointing staff 1.3. Develop an agreed process for recruiting and appointing staff that complies with legal and organisational requirements
2. Recruit and select the manager	2.1. Develop a position description for the manager that includes appropriate selection criteria 2.2. Ensure that advertising for the position complies with organisational policy and legal requirements 2.3. Establish a selection panel that represents ***key stakeholders*** 2.4. Develop appropriate interview questions, using ***independent assistance*** as required 2.5. Participate in interviewing and selecting a manager who satisfies the established selection criteria
3. Negotiate an employment contract	3.1. Check the employment contract developed to ensure it complies with organisational policy and legal requirements 3.2. Benchmark salary and conditions against similar organisations 3.3. Identify and document performance outcomes

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Review and renegotiate contract as required
4. Work with the manager	4.1. Ensure that the manager is inducted 4.2. Develop ***communication and reporting mechanisms*** between the manager and the board 4.3. Develop protocols for decision making and ***delegation of powers*** 4.4. Establish policy and procedure to manage conflict and/or grievances between the manager and the board 4.5. ***Regularly review*** the manager's performance in accordance with the employment contract

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to:
  - work with others to develop and implement recruitment and selection processes and agree on an employment contract
  - give feedback to the manager about performance
- conflict-management skills to deal with grievances, disputes and disagreements
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- organisational skills to ensure that policies and procedures are followed in relation to recruitment, selection and management of the manager

Required knowledge

- award structures for industrial agreements
- benchmarking of salaries and conditions
- concept of community control of organisations and how it may impact on the recruitment and selection process
- contract management principles
- cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact on the recruitment and selection process and the role of the manager
- documentation required for recruitment and selection
- equal employment opportunity and anti-discrimination legislation in relation to

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REQUIRED SKILLS AND KNOWLEDGE
recruiting and selecting staff • geographic, social, economic and political contexts in which particular organisations operate and how these may impact on recruitment and selection process and the work of the manager • interviewing techniques and selection processes • organisational policies and procedures in relation to the selection, appointment and management of staff, including grievance procedures • performance management processes and models for giving feedback • provisions of federal, state or territory legislation and funding body requirements that may impact on the recruitment and selection process and work of the manager • relevant aspects of industrial relations legislation

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • work with fellow board members to source and select a suitable manager for the organisation • demonstrate awareness of equal employment opportunity and anti-discrimination requirements when recruiting and selecting staff • establish policy and procedures to ensure a good working relationship between the manager and the board.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of relevant recruitment, selection and performance management documents • access to examples of issues that affect recruitment, selection and performance management • knowledge and performance to be assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to

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EVIDENCE GUIDE	
	assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIM506C Develop employment policies.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Recruitment and selection will include:	• developing or adapting position and job descriptions • advertising • developing selection criteria • following established application process • short-listing applicants • selecting interview panel • developing interview questions • short-listing interviewees • conducting referee and security checks • selecting suitable candidate • informing successful and unsuccessful candidates.
Key stakeholders may include:	• board members • community members

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RANGE STATEMENT	
	• Elders • local government • funding body representative • other Aboriginal and Torres Strait Islander organisations • staff • traditional owners.
Independent assistance may include:	• consultants • peak body groups • experienced network members • senior government or non-government personnel • employee groups.
Communication and reporting mechanisms may include:	• manager's report for the annual general meeting • regular written and verbal report • report against performance outcomes • standing item at board meeting.
Delegation of powers may relate to:	• employing and dismissing staff • purchasing goods and services • signing cheques • signing contracts • speaking to the media.
Regular review may include:	• annual performance review • assessment against performance outcomes • independent assessment • interview • 360 degree feedback.

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIL511A Lead the organisation's strategic planning cycle

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to lead the strategic planning process of an organisation and to assist board members to develop and implement a strategic planning cycle. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals responsible for planning, monitoring and guiding the activities of the organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish the strategic planning process	1.1. Agree to a documented ***strategic planning process*** with other board members 1.2. Identify and allocate ***resources*** to undertake strategic planning
2. Develop and review the organisation's values, vision and purpose	2.1. Consult board members, management, staff, community and key stakeholders regarding the values, vision and purpose of the organisation 2.2. Identify the agreed ***values***, ***vision and purpose*** of the organisation with other board members 2.3. Ensure the organisation's values, vision and purpose are documented and endorsed by the board
3. Analyse the internal and external factors that could impact on the organisation's strategic plan	3.1. Review and evaluate the previous strategic plan 3.2. Identify and analyse community aspirations, interests and needs 3.3. Identify and analyse changing government policy and funding that might affect the organisation 3.4. Identify and analyse ***emerging and predicted trends*** 3.5. Identify and analyse the potential for ***strategic alliances and partnerships*** 3.6. Seek advice from appropriate experts when necessary
4. Establish strategic objectives and strategies	4.1. Develop and agree on ***strategies*** and ***SMART objectives*** with other board members that are consistent with the outcome of the research and analysis undertaken 4.2. Ensure objectives and strategies are achievable and that they are benchmarked against industry and community standards 4.3. Identify and document ***factors*** that may affect achievement of objectives

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ELEMENT	PERFORMANCE CRITERIA
5. Monitor and evaluate strategic performance	5.1. Develop an implementation plan with other board members that identifies targets, ***key performance indicators***, performance standards, timelines and reporting requirements for the strategic planning period 5.2. Monitor and evaluate progress reports against the plan to identify successes and performance gaps 5.3. Review and revise strategic objectives and strategies with other board members where necessary

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- evaluation skills to monitor the progress of the strategic plan and analyse gaps in performance
- research skills to ensure accurate and current information is available for review and analysis
- strategic thinking skills to collate data from a number of different sources and make recommendations to the board about strategic organisational objectives and strategies
- time-management and planning skills to ensure that strategic plans meet realistic timeframes and are regularly monitored

Required knowledge

- benchmarking principles and approaches
- community consultation and engagement strategies
- components of the strategic planning cycle
- concept of community control of organisations and how it may impact on the strategic planning process and content of plans
- cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that could impact on organisational planning
- data collection methods
- geographic, social, economic and political contexts in which particular organisations operate and how these may impact on organisational planning

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REQUIRED SKILLS AND KNOWLEDGE
• organisational policies and procedures relevant to planning • provisions of federal, state or territory legislation and funding body requirements that may influence decision making • relevant protocols and cultural responsibilities that impact on the planning process • roles and responsibilities of board and management in organisational planning • strategic planning principles, approaches and strategies, including setting objectives • values, vision and purpose of the organisation

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • establishand maintain a strategic planning cycle with the board • work with board, members and community to formulate strategic objectives and strategies • ensure strategic performance is reviewed and monitored.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to office equipment and strategic planning resources • access to examples of relevant strategic planning documents and issues that affect strategic planning • knowledge and performance to be assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • performance of board duties or an accurate simulation of board duties • direct questioning combined with reflection of practical board performance

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EVIDENCE GUIDE	
	• analysis of responses to case studies and scenarios • observation of presentations • oral or written questioning • observation of performance in role plays.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Strategic planning process may include:	• establishment of working group or subcommittee
	• review of previous strategic plan
	• consultation with Elders, traditional owners, members and community
	• information collection and documentation
	• development of:
	  • values, vision and purpose
	  • objectives of strategic plan
	  • strategies for achieving goals
	  • performance measures
	• review of draft strategic plan.

Resources may relate to:	• board member support • community members • development of working group or subcommittee • external consultants • finances • identified partnerships • information and communication technologies • network contacts • planning expertise • staff.

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RANGE STATEMENT	
Values may include:	• business practices • culture • community • community control • family • heritage • self-determination • service and product standards • staff management.
Vision and purpose may relate to:	• long-term community goals • organisational goals.
Emerging and predicted trends may include:	• business and social enterprise possibilities • community needs and issues • demographic change • funding priorities • government legislation and policy • local expenditure • new and changing competitors • social trends.
Strategic alliances and partnerships may refer to:	• businesses • local, state or territory, and federal governments • individuals • other organisations.
Strategies may involve:	• culture • community involvement • programs.

SMART objectives:	• are specific, measurable, achievable, realistic and time bound
	• may relate to:
	  • board practices
	  • community development
	  • finances
	  • human resources
	  • services and products.

Factors may include:	• community • cultural • political • resources • technical.

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RANGE STATEMENT	
Key performance indicators may include:	• measures for monitoring or evaluating the efficiency or effectiveness of the plan's implementation • measures used to demonstrate success and identify areas for improvement.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIL512A Be a leader in the community

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake a leadership role as a board member. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of the business or core functions of organisations who contribute their skills and knowledge to monitoring and guiding the activities of the organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Lead by example	1.1. Identify the qualities of effective community leaders 1.2. Analyse own leadership style and performance 1.3. Use knowledge and skills to communicate effectively and demonstrate respect for ***community values*** 1.4. Identify changes that may affect the organisation and the community and discuss their implications 1.5. Implement change in a culturally sensitive way 1.6. Identify how personal actions can impact on ***others***
2. Access information about the community	2.1. Gather and analyse information on ***social***, ***cultural and economic needs*** of all sections of the community 2.2. Follow ***protocols for information sharing***
3. Encourage others to participate in the organisation's activities	3.1. Encourage the involvement of members of the community in the governance of the organisation 3.2. Encourage active community participation in the organisation 3.3. Promote a team and community approach to the activities of the organisation
4. Determine the big picture on community issues	4.1. Form opinions after researching the background to community issues 4.2. Consider and discuss regional and national issues

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ELEMENT	PERFORMANCE CRITERIA
	relating to Aboriginal and Torres Strait Islander people and the wider community 4.3. Consult Elders, traditional owners, government departments and others regarding community issues
5. Provide directions and make decisions	5.1. Identify and document options to address community and organisational issues 5.2. Present options for community discussion 5.3. Consider and evaluate other points of view when making clear, rational ***decisions*** that reflect community wishes 5.4. Promote consensus where there is a difference of opinion 5.5. Inform Elders, traditional owners and others about how and why decisions are made 5.6. Implement and follow decisions made by the board
6. Negotiate with others to promote community interests	6.1. Give priority to community interests in dealing with government, business and other organisations 6.2. Represent the views of the board to others 6.3. Negotiate and document outcomes that represent the best possible solutions for the community at the time
7. See both sides of community issues	7.1. Analyse points of view expressed on an issue in terms of their impact on the community and the organisation 7.2. Include Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander points of view when making decisions 7.3. Support decisions that reflect the long-term wellbeing of the whole community

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication, teamwork and negotiation skills to:
  • gather and present information
  • work cooperatively with other board members, management and staff of the

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REQUIRED SKILLS AND KNOWLEDGE

organisation, members, community and key stakeholders
• culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
• facilitation and communication skills to:
  • effectively communicate information to others
  • represent the board and community to others
• mentoring, motivation and networking skills to encourage others to participate
• problem-solving skills to identify and manage real and perceived conflict of interest between parties
• leadership skills required to provide direction and guidance to the community
• research, evaluation and decision-making skills to:
  • gather information
  • monitor and review information presented to the board
  • enact decisions

Required knowledge
• change management processes • characteristics of effective community leadership • concept of community control of organisations and how it may impact on community leadership • cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact on community leadership • current issues that might impact on the organisation, its members and community • geographic, social, economic and political contexts in which particular organisations operate and how these may impact on community leadership • information about the community and its needs • information on government policy and other factors that affect Aboriginal and Torres Strait Islander communities • leadership styles • relevant protocols and cultural responsibilities that impact on community leadership • traditional and current leadership models and theories

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • identify community needs, government policies and other factors that have an impact on Aboriginal and Torres Strait Islander communities • evaluate ideas and opinions, and make decisions based on the best interests of the community • provide direction and leadership to ensure involvement and community wellbeing
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of community issues relevant to boards of governance • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • observation of presentations • oral or written questioning to assess knowledge • observation of performance in role plays • analysis of feedback from other board members, staff, community or other stakeholders regarding performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIW514C Represent your organisation.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Community values may include:	• caring for country • importance of family, kin and community • maintenance of culture and heritage • respect for others.
Others may include:	• community members • Elders • staff • traditional owners.
Social, cultural and economic needs may include:	• education and health • employment • housing • law, lore and ceremony.
Protocols for information sharing may relate to:	• confidentiality and privacy • land matters • men and women's business • storage and transfer of information.
Processes for making ***decisions*** may include:	• communicating decisions • consultation with Elders and traditional owners • consensus • decision by authority • majority voting.

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIM412B Implement a business like approach

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit covers adopting a business like manner in all aspects of operations. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of the business or core functions of organisations who contribute their skills and knowledge to monitoring and guiding the activities of organisations in the Indigenous community.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify business like attitudes	1.1. Discuss and describe differences between business-like and non business-like attitudes 1.2. Identify and document key differences 1.3. Identify and document differences within existing policies and programs
2. Implement business like practices	2.1. Modify and document present policies and programs appropriately to reflect a business-like approach 2.2. Advise relevant ***stakeholders*** accordingly 2.3. Review, modify and document strategic and business plans
3. Review operations regularly	3.1. Review all ***operations*** from a ***business-like perspective*** 3.2. Identify areas of concern and implement actions as appropriate

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills
• Written and oral communication • Evaluation and decision-making • Planning • Networking • Negotiation
Required knowledge
• Cultural context - Boards are upholders of traditional and cultural values. Relevant aspects of culture may include: cultural protocols, language (both Traditional and Aboriginal English), Aboriginal learning styles, cultural business, family and community responsibilities and local history • Community control - community participation and control in decision-making are central to organisations and the role of Boards is to support the community in these processes • Location and resources - organisations operate in diverse locations where cultural, social, economic and political conditions may vary widely. Also, acute resource shortages may also determine the options available • Legal requirements - organisations operate under provisions of federal, state or territory legislation as legal entities and funding recipients which influence decision-making • Business processes • Organisation processes • Business support services

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • integrated demonstration of all elements of competency and their performance criteria, and • the organisation is assisted to become more business-like and self sufficient.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • this unit of competency should be assessed through the performance of Board duties, but in the event that there is no opportunity to observe such a performance a simulated environment can be used but such simulation must replicate Board conditions in terms of: performing the task; managing a number of different tasks; coping with irregularities and breakdowns in routine; dealing with the responsibilities and expectations of the Board, including working with others; and transferring competency to other situations • knowledge and performance to be assessed over time to confirm consistency in performance.
Method of assessment	The following assessment method is appropriate for this unit: • performance of Board duties, or through an accurate simulation of Board duties.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Stakeholders may include:	• community • other relevant services • funding bodies.
Operations may include:	• not-for-profit services • commercial services.
A business-like perspective may	• best use of resources • viability and potential growth

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RANGE STATEMENT	
include:	• cost/benefit • quality assurance • influences affecting decision-making • professional versus personal interests.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - ATSI Governance

Co-requisite units

Co-requisite units		

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BSBATSIM414C Oversee the organisation's annual budget

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and implement the annual budget and enable the board to control the finances of the organisation. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals responsible for monitoring and planning the organisation's finances.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Gather and analyse relevant budget information	1.1. Establish a ***budget working group*** 1.2. Review and analyse previous year's ***budget performance*** 1.3. Gather budget planning information from ***relevant sources*** 1.4. Identify priorities in relation to the organisation's vision and plans
2. Identify and document income and expenditure	2.1. Identify known sources of ***income*** 2.2. Identify new sources of income and amounts for new activities 2.3. Review ***expenditure*** for existing operations 2.4. Estimate expenditure for new initiatives and expansions 2.5. Identify ***potential problem areas*** 2.6. Ensure procedures are in place to document all identified items in a readily accessible and useful format
3. Oversee budget preparation	3.1. Contribute to budget development 3.2. Review budget documentation and clarify where required 3.3. Review draft budgets and propose modifications if required

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Ensure contingency plans are included in the budget
4. Review and finalise budget	4.1. Ensure expenditure commitments are in line with the final income figures 4.2. Work with other board members and management to finalise and approve the annual budget 4.3. Present the final annual budget to the community 4.4. Review and update the budget regularly

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- numeracy skills to:
  - interpret information in budget papers
  - perform simple calculations
- communication and teamwork skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- evaluation and decision-making skills to monitor and review information presented to the board and enact decisions
- initiative and enterprise skills to make decisions and prioritise future activity
- problem-solving skills to identify and manage differences of opinions

Required knowledge

- components of a typical budget and standard budgeting procedures
- concept of community control of organisations and how it may apply to budgetary decision making
- concept of financial contingency planning and how this can be undertaken
- current and potential sources of income to fund the organisation's activities
- geographic, cultural, social, economic and political context in which particular organisations operate and how this might impact on budgetary decision-making
- organisational plans that will have an effect on the budget
- organisationalvision, objectives and procedures in relation to sources of income for organisational activities

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REQUIRED SKILLS AND KNOWLEDGE
• provisions of federal, state or territory legislation and funding body requirements that impact on how finances and assets are able to be used within the organisation • relevant protocols and cultural responsibilities when making budgetary decisions

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • identify typical information to be included in a budget • recognise when a budget indicates that expenditure is greater than income, and suggest modifications that would bring it into balance • prepare a balanced budget in collaboration with others that meets the board's identified needs.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of budgets • access to examples of relevant documents • access to examples of projects that might be undertaken by a board • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with reflection of practical performance by the candidate • observation of performance on a board or simulated board • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIM418A Oversee financial management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Budget working group may include:	• board subcommittee together with senior management and staff • community members • Elders • external expertise • traditional owners.
Budget performance may relate to:	• budget variances, such as under or over-expenditure • revenue and expenditure targets.
Relevant sources may include:	• accountant • audited financial statements • business manager • funding bodies • treasurer • quotes.
Income may include:	• enterprise operations • grant funds • interest on investments • royalties and other payments • service contracts.
Expenditure may relate to:	• administration • capital requirements • consultants

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RANGE STATEMENT	
	• distributions • repair and maintenance • salaries • vehicle costs.
Potential problem areas may include:	• administration costs • commercial activities • consultancy fees • salary costs • utility costs • vehicle and travel expenses.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIM416A Oversee organisational planning

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to oversee the development of plans that guide the operations of the organisation. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who are responsible for monitoring, guiding and planning the activities of Aboriginal and Torres Strait Islander organisations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Gather relevant planning information	1.1. Consult with ***community*** to identify needs, issues, visions and interests 1.2. Identify people with appropriate expertise both within and outside the organisation who could assist the planning process 1.3. Identify and obtain ***relevant planning information***, including the organisation's current provision of services 1.4. ***Review*** the effectiveness of this provision in terms of meeting organisational and community needs
2. Set directions for planning	2.1. Work with board members to set or review the vision, goals and objectives of the organisation 2.2. Seek the support of internal or external experts if required 2.3. Analyse and use information to make planning decisions 2.4. Identify the type of ***planning activity*** required to meet the needs of the organisation 2.5. Identify the key purpose and essential components of the planning activity 2.6. Clarify the roles of board, management and staff in the planning activity
3. Ensure plans and	3.1. Check plans and planning processes to ensure they

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ELEMENT	PERFORMANCE CRITERIA
planning processes meet cultural objectives	maintain and enhance ***cultural identity*** 3.2. Check plans and planning processes to ensure they reflect ***cultural requirements*** and ***protocols that promote cultural respect*** 3.3. Develop strategies to address areas where conflict may occur between cultural and economic requirements 3.4. Check plans to ensure they reflect the vision and objectives of the organisation
4. Oversee the development of plans	4.1. Work with board members and senior staff to establish a ***plan development process*** and timeframe 4.2. Ensure adequate ***resources*** are available to develop plans 4.3. Ensure plans meet ***legal and compliance requirements*** 4.4. Ensure plans meet ***financial targets and funding requirements*** 4.5. Ensure plans include risk management strategies 4.6. Ensure plans include consideration of ***sustainability*** 4.7. Monitor plan development and adjust where appropriate
5. Approve plans	5.1. Work with other board members to approve agreed plan for implementation 5.2. Communicate approved plans to the community

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to review current organisational services and existing plans
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- evaluation and decision-making skills to monitor and review information presented to the board and enact planning decisions
- numeracy skills to understand relevant numerical data
- oral or written communication skills to be able to gather and share information

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REQUIRED SKILLS AND KNOWLEDGE
• organisational and planning skills to ensure that plans that meet the vision, goals and objectives of the organisation are developed in a timely manner • problem-solving skills to deal with planning information which is contradictory, ambiguous, inconsistent or inadequate • research skills to identify and access planning information • teamwork skills to develop plans cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
Required knowledge
• board processes for decision making • concept of community control of organisations and how it may impact on organisational planning • cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values and how that could impact on organisational planning • geographic, social, economic and political contexts in which particular organisations operate and how these may impact on organisational planning • methods for community consultation and engagement • methods for setting vision, goals and objectives • organisation review processes, such as a SWOT analysis • potential funding sources to support organisational goals and objectives • principles of risk management relevant to organisational planning • provisions of federal, state or territory legislation and funding body requirements that influence decisionmaking and may impact on organisational planning • relevant organisational planning concepts • relevant principles of sustainability • relevant protocols and cultural responsibilities with respect to planning • roles and responsibilities of board and management in organisational planning

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and	Evidence of the ability to:

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EVIDENCE GUIDE	
evidence required to demonstrate competency in this unit	• develop plans that are consistent with community needs, cultural requirements and organisational directions • identify and access information relevant to planning activity • identify risk management and sustainability strategies • oversee organisational planning.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of organisational plans • knowledge and performance is assessed over time to confirm consistency in performance • participation on an actual or simulated board.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of planning information and documentation • direct questioning combined with reflection practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of planning processes • observation of performance in role plays • performance of board duties or an accurate simulation of board duties.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIC411C Communicate with the community • BSBATSIM417A Implement organisational plans • BSBRES401A Analyse and present research information.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Community may include:	• community members • Elders • members of the organisation • other Aboriginal and Torres Strait Islander organisations • other relevant stakeholders • traditional owners.

Relevant planning information may include:	• existing organisational plans
	• community and stakeholder feedback
	• funding and resource opportunities
	• market research
	• organisational documentation, such as:
	  • annual general report
	  • constitution
	  • financial reports and budgets
	  • networks and supporters
	  • policy and procedures
	  • vision and purpose statements
	• relevant data and statistics
	• relevant government reports, strategic directions, and policy
	• staff skills and capabilities.

Review may involve:	• community and stakeholder feedback • evaluation reports • gap analysis • market research • SWOT analysis.
Planning activity may include:	• action plans • business plans • cultural plans • financial plans • marketing and promotion plans

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RANGE STATEMENT	
	• staffing plans • strategic plans.
Cultural identity may include:	• common cultural values that underpin Aboriginal and Torres Strait Islander people • diversity and uniqueness of individual communities • languages, songs, arts and artwork • Native Title status and issues • relationship with the land.
Cultural requirements may include:	• cultural protocols • recognition of diversity.
Protocols that promote cultural respect may include:	• community processes of consultation • local traditions and customs • recognition of Elders and traditional owners • respect and courtesy to other communities • rights of others, rights of privacy, and secret business.
Plan development process may include:	• consultation with community and key stakeholders • feedback from community and key stakeholders.
Resources may include:	• board member support • development of working group or subcommittee • external consultants • finances • identified partnerships • information and communication technologies • network contacts • planning expertise • staff.
Legal and compliance requirements may include:	• contractual requirements • management of occupational health and safety • reporting requirements.
Financial targets and funding requirements may include:	• budget • financial obligations • financial viability • funding and service agreements • possible funding options.

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RANGE STATEMENT	
Sustainability may include:	• cultural factors • economic factors • environmental factors • social factors.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIM417A Implement organisational plans

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to guide the implementation of organisational plans. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who are responsible for monitoring and guiding the activities of Aboriginal and Torres Strait Islander organisations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Secure resources and funding to implement organisational plans	1.1. Review organisational plan to identify required ***resources*** and ***funding sources*** 1.2. Identify possible ***partnership arrangements*** 1.3. Follow ***organisation's policies***, ***practices and procedures*** in obtaining resources and funding to implement plans
2. Oversee the implementation of organisational plans	2.1. Establish a ***plan for implementation*** that includes timelines and reporting requirements 2.2. Identify the roles and responsibilities of board members in implementation plan 2.3. Identify ***key performance indicators*** (KPIs) for plan implementation and use to monitor progress 2.4. Establish internal reporting strategies to inform board members of implementation progress 2.5. Undertake ***contingency planning*** in consultation with key stakeholders as required 2.6. Ensure procedures are in place to document planning and implementation outcomes
3. Monitor, review and evaluate implementation	3.1. Analyse implementation progress reports 3.2. Develop strategies to address ***changing situations*** when necessary 3.3. Make appropriate implementation decisions as required, including changes to plan

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Evaluate the implementation of organisational plan

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analysis and problem-solving skills to review changing situations and make appropriate decisions relation to monitoring the implementation of organisational plans • communication and teamwork skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders • culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities • organisational skills to ensure planning occurs according to established timelines and procedures • initiative and enterprise skills to develop ideas and strategies to implement them
Required knowledge
• concept of community control of organisations and how it may impact on organisational planning • contingency planning strategies • cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that may affect the implementation of organisational plans • geographic, social, economic and political contexts in which particular organisations operate and how these may impact on the viability of organisational plans • key elements of implementation plans • legislation and funding body requirements that may influence planning decisions • methods for monitoring and reporting on plan implementation • organisational policies, practices and procedures relevant to the development of organisational plans • possible partnership arrangements with other organisations to achieve organisational objectives • protocols and cultural responsibilities relevant to the development of organisational plans • roles and responsibilities of board members

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REQUIRED SKILLS AND KNOWLEDGE
• sources of funding and other key resources relevant to implementing organisational plans

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • develop an implementation plan that clearly identifies key activities, personnel, outcomes, resource requirements and timelines • establish strategies to monitor, review and evaluate implementation • solve implementation problems that may affect the plan.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of relevant planning implementation documents • access to examples of issues that affect planning implementation • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge

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EVIDENCE GUIDE	
	• observation of performance in role plays.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIM416A Oversee organisational planning.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Resources may include:	• external consultants • financial resources • human resources • physical resources • pro bono support • technical resources.
Funding sources may include:	• business partnerships • donations • earned income • fundraising events • government funding and grants • membership fees • philanthropic grants • pro bono work.
Partnership arrangements may refer to:	• auspice arrangements • partnership with another Aboriginal and Torres Strait Islander organisation • partnership with a non-Aboriginal and Torres Strait Islander organisation • partnership with a business • resource sharing with another organisation.
Organisation's policies, ***practices***	• organisational culture • organisational guidelines that govern and

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RANGE STATEMENT	
and procedures may refer to:	prescribe operational functions, such as the acquisition and management of financial, human, physical and technical resources • standard operating procedures • undocumented practices in line with organisational operations.
Plan for implementation must include:	• key tasks and activities • key milestones and deliverables, such as results and KPIs • key stakeholders • responsible person • resources required • timeline.
Key performance indicators:	• may refer to measures for monitoring or evaluating the efficiency or effectiveness of implementing the plan • may be used to demonstrate success and identify areas for improvement.
Contingency planning may refer to:	• changing planned outcomes • seeking further funding • reducing expenditure • rental, hire purchase or alternative means of procurement of required materials, equipment and stock • risk identification, assessment and management processes • strategies for reducing costs, wastage, stock or consumables • succession planning • using external consultants and labour.
Changing situations may refer to:	• community needs and markets • environmental factors • funding sources • government policy • legislation • partner relationships • project scope • timelines.

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIM418A Oversee financial management

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to monitor and act on financial reports. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who are responsible for monitoring and guiding the financial management of Aboriginal and Torres Strait Islander organisations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Interpret financial reports	1.1. Ensure regular financial information is received from management in a form that all board members can understand 1.2. Clarify purpose of ***financial reports*** and their key features with board members 1.3. Identify income shortfalls and expenditure overruns
2. Evaluate financial reports	2.1. Consider and discuss financial implications of reports with other board members and management 2.2. Compare data with previous reports and decisions 2.3. Compare year to date and end of financial year data with budgeted outcomes 2.4. Seek ***independent advice*** where necessary
3. Recognise board responsibilities for assets	3.1. Identify ***statutory responsibilities*** of board members with respect to assets 3.2. Identify funding body restrictions on the acquisition, use and disposal of assets 3.3. Comply with statutory responsibilities and funding body requirements with respect to assets
4. Make decisions on finance	4.1. Analyse recommendations on finances in terms of their impact on the organisation and its vision and objectives 4.2. Prioritise financial decisions against organisational objectives 4.3. Make decisions in accordance with the organisation's policy and legal and funding requirements 4.4. Ensure procedures are in place to document

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ELEMENT	PERFORMANCE CRITERIA
	financial decisions
5. Approve expenditures	5.1. Check expenditure proposals are within budget and meet statutory and funding body requirements 5.2. Check the organisation's current financial situation 5.3. Approve expenditure only if it is consistent with budget, statutory and funding body requirements, and the organisation's financial situation
6. Review financial decisions	6.1. Monitor outcomes and actions from decisions 6.2. Identify and monitor ***external influences*** on budgets and finances 6.3. Ensure procedures are in place to document variations to financial agreements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- numeracy skillsto read financial reports and calculations
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- communication and teamwork skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- evaluation and decision-making skills to monitor and review information presented to the board and enact decisions
- initiative and enterprise skills to set priorities when making financial decisions

Required knowledge

- concept of community control of organisations and how it may impact on financial decisions
- cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact on financial decisions
- geographic, social, economic and political contexts in which particular organisations operate and how these may impact on financial decisions
- organisational procedures and processes regarding finances
- organisationalvision and objectives

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REQUIRED SKILLS AND KNOWLEDGE
• previous budget performance and financial reports • purpose and components of financial reports • relevant protocols and cultural responsibilities when making financial decisions • statutoryand funding body requirements relevant to the organisation's financial decisionmaking • statutory and funding body responsibilities in relation to financial reporting and assets

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • understand a variety of financial reports • monitor the financial status of the organisation • make financial decisions according to organisational vision and objectives that comply with legal and contractual requirements • responsibly manage organisational assets.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of financial reports and other relevant documents • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios

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EVIDENCE GUIDE	
	• observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIM414C Oversee the organisation's annual budget • BSBATSIM420A Oversee asset management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Financial reports may refer to:	• annual audited financial statements • asset registers • balance sheets • bank accounts • budgets • expenditure • income • loans • profit and loss statements.
Independent advisers may include:	• accountants • business advisers.
Statutory responsibilities may relate to:	• annual reporting • acquittal reporting • fees and taxes • funding agreements • procurement and disposal.
External influences may include:	• awards • costs

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RANGE STATEMENT	
	• environmental factors • funding sources • government policy • inflation rate • interest rate • markets • supplies.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIM419A Contribute to the development and implementation of organisational policies

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to work with other board members to develop and implement the organisation's operational policies to serve the organisation and the community effectively. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who are responsible for monitoring and guiding the development and implementation of organisational policies in Aboriginal and Torres Strait Islander organisations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Design the process for developing policy	1.1. Work with other board members to establish a ***policy development group*** and develop a procedure for policy development 1.2. Consult the community where appropriate 1.3. Determine the need for expert advice 1.4. Delegate tasks to appropriate people
2. Obtain background information needed for policy development	2.1. Identify key areas of operation requiring policy development 2.2. Review relevant previous board decisions 2.3. Identify and review ***additional information*** required
3. Contribute to the drafting of policy	3.1. Provide input into the drafting of ***policy for each area*** of organisation activity 3.2. Check policy to ensure it reflects the vision of the organisation and ***cultural issues*** 3.3. Check policy to ensure it meets legal, constitutional and funding requirements 3.4. Provide feedback to the policy development group on draft policies
4. Approve policy	4.1. Provide an explanation of draft policy to ***others*** 4.2. Obtain and evaluate feedback 4.3. Propose amendments to draft policy where required in response to feedback

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ELEMENT	PERFORMANCE CRITERIA
	4.4. Work with board members to approve agreed policy 4.5. Ensure procedures are in place to document and store policy in an accessible form
5. Implement policy	5.1. Inform others of the board decision and the final policy 5.2. Review board decision to ensure it complies with policy 5.3. Evaluate organisational procedures to confirm consistency with policy
6. Review and amend policy as required	6.1. Review policy regularly to ensure the organisation's vision and values are maintained 6.2. Propose amendments to policy where appropriate 6.3. Ensure policy changes are documented according to organisational procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skillsto relate to people from diverse backgrounds and with diverse abilities
- communication and teamwork skills to consult with other board members, staff, members, community and others regarding policy development and implementation
- evaluation and decision-making skills to:
  - review draft and existing policies and procedures
  - propose new or changed policies
- information-gathering skills to obtain information required for policy development
- negotiation skills to work with others to develop acceptable policies and ensure their implementation
- oral, diagrammatic or written literacy skills to be able to gather and share information

Required knowledge

- concept of community control of organisations and how it may impact on the development and implementation of policies

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REQUIRED SKILLS AND KNOWLEDGE
• cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that could impact on the development and implementation of policies • equity and diversity principles that might need to be applied when developing and implementing policies • geographic, social, economic and political contexts in which particular organisations operate and how these may impact on the development and implementation of organisational policies • organisation's constitution, vision, purpose and current processes • provisions of relevant federal, state or territory legislation and funding body requirements relevant to the content of particular organisational policies • relevant protocols and cultural responsibilities that could impact on the development and implementation of policies

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • work with others to implement a policy development process • contribute to policy development processes • inform others of new and changed policies • review and amend policies as required.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of policies • access to examples of relevant documents • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated

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EVIDENCE GUIDE	
	board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays • analysis of feedback from the community and stakeholders about performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Policy development group may include:	• board members • community members • expert advisers • staff members.
Additional information may relate to:	• examples of policies from other organisations • existing organisational policy • funding terms and conditions • relevant government policy documents • relevant research.
Policy areas may include:	• asset management • board processes • complaints • finance • occupational health and safety • programs and services • training

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RANGE STATEMENT	
	• vision and values • workplace relations.
Cultural issues may include:	• family obligations • gender • protection of culture and heritage • protocols • traditional responsibilities.
Others may include:	• clients • community • other organisations • staff.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIM420A Oversee asset management

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to account for and manage the organisation's assets. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals responsible for ensuring the organisation's assets are effectively managed.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop and implement policies and procedures for the management of assets	1.1. Work with other board members and staff to develop policies and procedures for managing assets that comply with legal and contractual requirements 1.2. Follow policies and ***administrative procedures*** regarding the purchase, use, storage, maintenance and disposal of assets
2. Ensure asset records are established	2.1. Ensure responsibility for establishing an ***asset register*** of the organisation's ***movable assets***, and the recording and storage of ***asset documents***, is delegated by the board to an appropriate person or persons 2.2. Check that the register has been established and that appropriate asset documents are stored securely
3. Ensure that assets and records are maintained	3.1. Receive and review reports with respect to assets to ensure they are up-to-date and complete 3.2. Ensure appropriate procedures are in place and followed to undertake asset repairs 3.3. Ensure appropriate procedures are in place and followed to report and document asset damage, loss or theft 3.4. Develop an action plan to follow up asset management issues that arise 3.5. Ensure asset records comply with funding providers'

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ELEMENT	PERFORMANCE CRITERIA
	requirements
4. Ensure insurance cover is in place	4.1. Ensure appropriate procedures are in place and followed to arrange and maintain insurance following asset acquisition 4.2. Identify authorised signatories for claims for damage, loss or theft 4.3. Ensure claims are submitted in a timely manner and include required evidence of loss
5. Oversee an annual internal audit of assets	5.1. Ensure items recorded in the asset register are checked annually 5.2. Ensure the asset register is updated with current information following the internal audit 5.3. Investigate discrepancies found in the asset register 5.4. Propose changes to policies and procedures if required
6. Oversee acquisition and disposal of assets	6.1. Approve acquisitions and disposal of assets in line with existing plans and budgets 6.2. Ensure funding body requirements regarding asset acquisition and disposal are met

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and teamwork skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- evaluation and decision-making skills tomonitor and review information presented to the board and enact decisions
- numeracy skills to review asset reports and identify discrepancies
- oral, diagrammatic or written literacy skills to be able to gather and share information
- problem-solving skills to identify and manage issues that arise in the management of assets

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge
• asset auditing procedures • asset purchasing and disposal procedures • funding body requirements with regard to assets • geographic, cultural, social, economic and political context in which particular organisations operate and how that may impact on the management of assets • organisational procedures and processes with respect to assets • provisions of federal, state or territory legislation and funding body requirements that have an impact on the management of assets • record-keeping requirements with regard to assets • relevant protocols and cultural responsibilities with respect to the management of assets

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • work with others to develop policies and procedures for managing assets • follow policies and procedures for managing assets.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of asset registers • access to examples of relevant asset policy and procedures • access to examples of relevant documentsand reports • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following

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EVIDENCE GUIDE	
	examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge • observation of performance in role plays • analysis of feedback from others involved in the management of assets.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIM418A Oversee financial management • BSBATSIW417C Select and use technology.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Administrative procedures may include:	• asset disposal • internal audit • invoices and receipts • identification labelling • insurance • purchasing • use and control.
Asset register:	• may be computer-based or manual records • may include: • additions

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RANGE STATEMENT	
	• date of purchase • identifying numbers • insurance claims • location • loss or theft • major repairs • obsolescence • value.
Movable assets may include:	• artworks • cultural items • goods • office furniture • plant and equipment • vehicles.
Asset documents may include:	• guarantees • invoices and receipts • insurance documentation • maintenance records • titles and certificates • warranties.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBATSIM421A Support a positive and culturally appropriate workplace culture

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required of a board member to contribute to the development and maintenance of a positive and culturally appropriate workplace culture. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals responsible for monitoring and guiding the activities of Aboriginal and Torres Strait Islander organisations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Promote respect toward people in the workplace	1.1. Promote cultural views and values in the workplace 1.2. Treat individuals and groups from different backgrounds, cultures and languages with respect and sensitivity 1.3. Identify and enhance the ***positive qualities*** of people 1.4. Take into account the impact of board decisions on human values when making decisions 1.5. Identify how ***past experiences*** may impact on people's behaviour, skills and knowledge
2. Provide support to others	2.1. Identify the ***knowledge***, ***skills and experience*** of others 2.2. Share knowledge and skills with ***others*** 2.3. Resolve issues in culturally appropriate and sensitive ways 2.4. Use active listening skills when communicating 2.5. Encourage others to take on new challenges 2.6. Demonstrate approachability and openness to suggestions
3. Promote an environment that encourages people to enhance their skills	3.1. Support others to achieve work goals 3.2. Develop and apply strategies to recognise ***achievements***

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ELEMENT	PERFORMANCE CRITERIA
and knowledge	3.3. Support others to undertake relevant ***professional development***
4. Encourage teamwork	4.1. Develop strategies that support a team approach 4.2. Clearly outline expectations of team members 4.3. Develop and apply strategies that recognise individuals' contributions to the team
5. Reduce the potential for cross-cultural misunderstandings	5.1. Identify issues that may cause cross-cultural conflict or misunderstanding in the workplace 5.2. Work with board members and the manager to develop and implement strategies to reduce cross-cultural misunderstandings in the workplace
6. Provide constructive feedback	6.1. Encourage provision of constructive ***feedback*** in the workplace 6.2. Clarify with board members and management whose role it is to provide feedback to staff members about their performance 6.3. Provide feedback to people about their performance where appropriate

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- active listening skills to enhance communication
- communication and teamwork skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- initiative skills to demonstrate cross-cultural competence, ensuring a culturally appropriate workplace that respects people from a range of backgrounds
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- mentoring and motivation skills to support others in their work
- problem-solving skills to identify and manage potential causes of misunderstandings

Required knowledge

- concept of community control of organisations and how it may impact on the

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REQUIRED SKILLS AND KNOWLEDGE
day-to-day operations of the organisation • cultural context in which Aboriginal and Torres Strait Islander boards operate, including role in upholding traditional and cultural values and how that impacts on workplace environment • equity and diversity principles • geographic, social, economic and political contexts in which particular organisations operate and how these may impact on the workplace environment and culture • organisationalpolicies, procedures and code of conduct • professional development options • protocols and cultural responsibilities relevant to the role of a board member • respective roles and responsibilities of board members and the manager • strategies for active listening • strategies for giving and receiving feedback • strategies for managing disagreements and cross-cultural misunderstandings • teamwork theory and approaches

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • support others to achieve work goals • treat staff and colleagues with respect and sensitivity • communicate appropriately with people from a range of diverse backgrounds • employ strategies to encourage teamwork and reduce the potential for cross-cultural misunderstandings.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of issues that arise in workplaces

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EVIDENCE GUIDE	
	• knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays • analysis of feedback from staff members, other board members and the community regarding performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIC412A Maintain and protect cultural values in the organisation.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Positive qualities may include:	• attitudes and values • initiative • skills and abilities.
Past experiences may relate to:	• culture • effects of government policies • educational opportunities

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RANGE STATEMENT	
	• family situations • trauma.
Knowledge**, **skills and experience may include:	• interpersonal skills • traditional knowledge and skills • work skills.
Others may include:	• board members • community members • staff members.
Achievements may include:	• personal • cultural • family • sport • work-based.
Professional development may include:	• career planning • cultural enhancement • further education • personal development • work skills.
Feedback may be:	• to staff by staff • to staff by a board nominee.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBATSIM505C Control organisational finances

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish and maintain effective financial management within the organisation to ensure board control of finances and external accountability to statutory authorities and funding bodies. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of the business or core functions of organisations who have responsibilities for controlling an organisation's finances.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish a financial management structure	1.1. Establish a structure to undertake regular ***financial management responsibilities*** on behalf of the board 1.2. Document respective responsibilities of the board and management 1.3. Determine financial information required by the board from management 1.4. Seek advice on suitable financial management systems for the organisation 1.5. Identify relevant statutory requirements
2. Establish financial management processes and systems	2.1. Ensure appropriate policies and procedures are in place to open and operate necessary bank accounts 2.2. Identify approved ***signatories*** for the bank accounts 2.3. Ensure authority and delegation between the board and management for the management of finances are documented 2.4. Ensure ***statutory requirements*** with regard to financial management are followed 2.5. Ensure duties of finance staff are documented 2.6. Ensure accepted procedures for receiving and expending funds are established and maintained by management 2.7. Ensure accepted ***systems for financial reporting*** are established and maintained

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ELEMENT	PERFORMANCE CRITERIA
3. Sign contracts on behalf of the organisation	3.1. Ensure procedures for developing and documenting contracts are developed and followed 3.2. Identify people authorised to sign contracts on behalf of the organisation 3.3. Check that proposed contractual arrangements are realistic for the organisation and in the organisation's and community's interests 3.4. Ensure contracts are signed according to organisational policies and procedures
4. Follow finance procedures specified by funding bodies	4.1. Seek variations to financial agreements from relevant funding bodies if required 4.2. Identify and follow purchasing and disposal procedures specified by funding bodies 4.3. Check that requirements for finance documentation specified by funding bodies are met
5. Advise the community of the financial situation of the organisation	5.1. Identify the type and content of ***financial information*** that can be made publicly available 5.2. Ensure financial information is made available to members as specified in the constitution 5.3. Present financial information at meetings in a clear and simple manner
6. Meet reporting requirements of relevant corporate authorities and funding bodies	6.1. Identify reporting requirements by relevant corporate authorities and funding bodies 6.2. Establish timelines to ensure financial statements are completed within the timeframe required by ***relevant corporate authorities and funding bodies*** 6.3. Ensure an auditor is appointed at the annual general meeting 6.4. Review and evaluate financial statements to ensure they meet requirements 6.5. Check that financial reports are submitted to relevant corporate authorities and funding bodies within required timeframe

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication, teamwork and negotiation skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- culturally appropriate communication skills to:
  - relate to people from diverse backgrounds and with diverse abilities
  - present financial information clearly and simply
- delegation skills to enable tasks to be completed within required timeframes
- evaluation and decision-making skills to monitor and review information presented to the board and enact decisions
- numeracy skills to interpret reports and undertake calculations
- problem-solving skills to identify and manage anomalies in financial reports

Required knowledge

- concept of community control of organisations and how it may impact on reporting to community
- cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact on financial reporting to the community
- financial responsibilities of board members and management
- financial support services available
- geographic, social, economic and political contexts in which particular organisations operate and how these may impact on financial management and reporting processes
- organisationalpolicies and procedures in relation to finances
- provisions of federal, state or territory legislation and funding body requirements that impact on financial management and reporting
- purpose and meaning of components of financial reports
- statutory and funding body requirements in relation to finances
- systems and structures to effectively manage finances

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • identify role of the board and management in the control of finances • read and interpret typical organisational financial reports • follow policies and procedures regarding the organisation's financial management • communicate financial information simply and clearlyto others • ensure financial reporting requirements are met.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of financial reports used by boards • access to examples of funding agreements and other relevant documents • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations and group discussions • oral or written questioning to assess knowledge • analysis of feedback from other board members.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Financial management responsibilities may include:	• approving expenditures • developing a budget • entering into funding agreements • reporting financial information • varying the agreed budget.
Signatories may include:	• a combination of board members and management • board members only • management only within limits.
Statutory requirements may include:	• acquittal of funds • audited reports • superannuation • taxation, including GST • workers' compensation.
Systems for financial reporting may include:	• computer-based systems • manual systems.
Financial information may include:	• annual audited reports • financial projections • monthly income and expenditure figures • project reports.
Relevant corporate authorities and funding bodies may include:	• government departments • other corporations • philanthropic trusts • project partners • Office of the Registrar of Indigenous Corporations • state and territory registration authorities.

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIM506C Develop employment policies

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop policies for the employment of staff. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals responsible for monitoring and guiding the employment policies of an organisation that employs staff.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop policies with respect to staff	1.1. Identify ***employer's responsibilities*** with respect to staff 1.2. Develop, negotiate and endorse ***staffing policies*** with board members, management and staff, and if appropriate, unions 1.3. Ensure approved policies are communicated throughout the organisation
2. Implement staff policies and procedures	2.1. Work with other board members and management to develop and document procedures flowing from endorsed policies 2.2. Establish and implement induction processes for new staff 2.3. Ensure changes to policies and procedures affecting employment are communicated to staff, and if applicable, to unions 2.4. Identify and access external ***industrial relations advice*** and representation as required 2.5. Ensure individual contracts for employees are developed and signed within relevant ***enterprise agreements*** or awards according to policies and procedures
3. Monitor and review staffing policies	3.1. Establish a ***review body*** for staffing policy 3.2. Monitor and assess outside ***industrial influences***

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ELEMENT	PERFORMANCE CRITERIA
	and impacts relevant to the organisation 3.3. Ensure regular occupational health and safety checks of the workplace are undertaken according to policy and procedures 3.4. Review grievance procedures regularly 3.5. Ensure all aspects of employment policy and procedures are ***audited*** independently 3.6. Evaluate results of reviews and audits and propose changes to policy and procedures if necessary

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication, teamwork and negotiation skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- evaluation and decision-making skills to:
  - develop and review staffing policies
  - monitor and review information presented to the board and enact decisions
- literacy skills to review documentation and communicate information to others

Required knowledge

- board's responsibilities in relation to duty of care with respect to staff
- concept of community control of organisations and how it may impact on employment policies
- cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact on employment policies
- effective communication and negotiation strategies to disseminate information and negotiate policies and procedures
- equity and diversity principles in relation to employment policies
- geographic, social, economic and political contexts in which particular organisations operate and how these may impact on employment policies
- organisationalpolicies and procedures in relation to staffing

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REQUIRED SKILLS AND KNOWLEDGE
• policy and procedure development processes • provisions of federal, state or territory legislation and funding body requirements that may influence employment policies, including industrial relations, occupational health and safety, and equal employment opportunity laws • relevant awards and employment conditions • relevant protocols and cultural responsibilities that might impact on employment policies

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • work with others to developand review employment policies and procedures • follow policies and procedures in relation to staff.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of legislation and policy affecting the employment of staff • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practicalboard performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations and group discussions • oral or written questioning to assess knowledge

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EVIDENCE GUIDE	
	• observation of performance in role plays.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIL510A Appoint and work with a manager • BSBATSIM514A Recruit and induct staff.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Employer's responsibilities may include:	• conditions of relevant awards • duty of care • provision of a safe workplace • compliance with state, territory and federal industrial relations legislation • supervision • training.
Staffing policies may relate to:	• awards and agreements • contracts • disputes, including management and staff • grievance procedures • health and wellbeing • induction of new staff • performance management • occupational health and safety • workplace rules and staff discipline.
Industrial relations advice may include:	• counselling • independent workplace audits • mediation • union representation.
Enterprise agreements may	• dispute resolution

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RANGE STATEMENT	
include:	• general employment conditions • minimum rates of pay and conditions • range of positions.
Review body may include:	• board subcommittee • external expertise • joint management and staff working group.
Industrial influences may include:	• award changes • changing technologies • changes to legislation • union involvement.
Audits may include:	• external quality auditors • occupational health and safety audits • staff meetings • surveys.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIM511C Develop enterprise opportunities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify, assess and develop business opportunities in consultation with the community in order to increase economic independence and expand employment. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals responsible for monitoring and guiding the activities of organisations that are investigating options to develop enterprise opportunities.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Expand existing activities	1.1. Identify existing business initiatives, employment goals and objectives 1.2. ***Evaluate current business activities*** with respect to viability and future potential 1.3. Seek expert advice where appropriate 1.4. Support viable businesses
2. Develop business ideas and options	2.1. Canvass the community for ***business ideas and options*** 2.2. Identify and document potential skills and abilities in the community 2.3. Identify and analyse potential ***markets*** 2.4. Obtain information from ***business services*** regarding business development
3. Evaluate business options	3.1. Assess potentially viable businesses 3.2. Conduct feasibility studies with the support of appropriately skilled personnel 3.3. Gather and document community input 3.4. Consider and document business options 3.5. In conjunction with other board members, make and document decisions regarding future business options 3.6. Contribute to the development of business plans that

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ELEMENT	PERFORMANCE CRITERIA
	take account of local cultural requirements
4. Implement business proposals	4.1. Establish ***structures*** to action business plans 4.2. Establish partnerships where appropriate 4.3. Establish monitoring and review mechanisms 4.4. Set and document achievable targets and timeframes 4.5. Establish and support boards of management of new businesses where appropriate 4.6. Provide information to the community on a regular basis

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- numeracy skills to evaluate information on business viability
- communication, teamwork and negotiation skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- evaluation and decision-making skills to monitor and review information presented to the board and enact decisions
- planning skills to develop and implement business plans
- problem-solving skills to identify and manage real and perceived conflict of interest between parties
- research and analytical skills to gather and evaluate business data
- oral and reading communication skills to develop and evaluate business proposals and plans

Required knowledge

- business planning strategies, including strategies for:
  - conducting feasibility studies
  - setting goals and objectives
- business processes
- business support services available
- concept of community control of organisations and how it may impact on business

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REQUIRED SKILLS AND KNOWLEDGE
options • cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact on business options and operations • geographic, social, economic and political contexts in which particular organisations operate and how these may impact on business options and operations • information generally included in feasibility studies and how it should be interpreted • marketing terms and strategies • organisationalpolicies and procedures in relation to business activities • possible business structures • provisions of federal, state or territory legislation and funding body requirements that may impact on business options and operations • relevant protocols and cultural responsibilities that might impact on the development of enterprise opportunities • strategies for identifying skills available in the organisation and community

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • identify potential business activities for the organisation and possible business structures to support these activities • develop business proposals in collaboration with others • make decisions regarding the suitability of business proposals • participate in business planning processes in collaboration with others.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board

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EVIDENCE GUIDE	
	• access to examples of enterprises operated by Aboriginal and Torres Strait Islander organisations • access to examples of relevant documents • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays • analysis of feedback from other board members, staff, community or other stakeholders regarding performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIW515C Secure funding.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Evaluation of current business activities may refer to:	• capital requirements • community motivation • cultural appropriateness • human resources

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RANGE STATEMENT	
	• market availability • risk.
Business ideas and options may include:	• establishing an independent business operation • establishing joint ventures with local government and/or private operators • tendering for supply of services.
Markets may include:	• Aboriginal and Torres Strait Islander networks • local, regional, state or territory, national or international consumers and organisations.
Business services may include:	• Aboriginal and Torres Strait Islander legal services • business development networks • government business information services • industry associations • local operators.
Structures may include:	• board of management • board members, staff, community representatives, business and finance advisers, industry advisers • capital requirements • core business • future directions • income and expenditure projections • legal structure • market strategies • staffing.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

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Co-requisite units

Co-requisite units		

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BSBATSIM514A Recruit and induct staff

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to recruit and induct new staff and provide ongoing supervision, assessment and support of existing staff, including voluntary staff. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who contribute their skills and knowledge to monitoring and guiding the activities of organisations that are involved in the recruitment and induction of voluntary or paid staff where a manager does not exist. This function may be undertaken by the board when a manager does not exist. Generally, the manager or chief executive officer is responsible for recruiting and supervising junior staff.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan ongoing staffing requirements	1.1. Review ***staffing requirements*** on a regular basis 1.2. Initiate knowledge and skill audits to decide on positions required 1.3. Update ***recruitment policy and procedures*** regularly 1.4. Include additional staffing requirements in the business plan 1.5. Allocate budget and resources
2. Ensure staff members are recruited in line with policy and procedures	2.1. Establish a ***recruitment committee*** 2.2. Review, endorse and document a duty statement for the position 2.3. Inform others of ***job vacancies*** 2.4. Follow the organisation's selection procedures 2.5. Notify candidates of ***results*** and provide feedback on their applications

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ELEMENT	PERFORMANCE CRITERIA
3. Induct new staff	3.1. Develop a formal ***contract*** for new employees 3.2. Outline the code of conduct and how it applies 3.3. Implement ***induction processes***
4. Ensure staff have access to training and development support	4.1. Assess and record staff ***development and training*** needs 4.2. Identify sources of funding for staff development 4.3. Ensure required staff training is provided 4.4. Encourage membership of relevant professional bodies 4.5. Promote the benefits to other employers of employing local Aboriginal and Torres Strait Islander employees
5. Monitor and assess staff performance regularly	5.1. Review duty statements at regular intervals 5.2. Receive and review reports on staff performance 5.3. Follow policy and procedures to identify the most appropriate person to provide effective feedback to staff on performance 5.4. Provide feedback to staff according to policy and procedures
6. Oversee staff departures	6.1. Ensure all contractual obligations and requirements are completed prior to ***staff departures*** 6.2. Adhere to appropriate policies and procedures regarding departures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication, teamwork and negotiation skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders • culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities • evaluation and decision-making skills to monitor and review information presented to the board and enact decisions • mentoring skills to support and develop new staff

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REQUIRED SKILLS AND KNOWLEDGE
• problem-solving skills to identify and manage real and perceived conflict of interest between parties • oral and written communication skills to document duty statements and induct staff
Required knowledge
• concept of community control of organisations and how it may impact on staff recruitment and induction processes • cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact on recruitment and induction processes • equity and diversity principles in relation to staffing • geographic, social, economic and political contexts in which particular organisations operate and how these may impact on recruitment and induction processes • organisationalpolicies, procedures and codes of conduct in relation to staff recruitment and induction, including recruitment and induction procedures • provisions of federal, state or territory legislation and funding body requirements that may impact on recruitment and induction processes • relevant protocols and cultural responsibilities that impact on recruitment and induction processes • training options suitable to staff and board members

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • select and induct staff according to organisational policies and procedures • monitor staff performance and provide feedback according to policies and procedures • identify appropriate professional development activities for staff • ensure policies and procedures relating to staff departures are followed.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of relevant policies and procedures • access to examples of relevant documents • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays • analysis of feedback from other board members, staff, community or other stakeholders regarding performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIM506C Develop employment policies.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Staffing requirements may relate	• paid staff:

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RANGE STATEMENT	
to:	• full-time • part-time • casual • contract • voluntary staff.
Recruitment policy and procedures may refer to:	• employment of local community members, family and kin • recruitment and selection processes • volunteer register.
Recruitment committee may include:	• board members • community members • Elders • independent advisers • senior staff • traditional owners.
Job vacancies may be advertised through:	• Aboriginal and Torres Strait Islander news outlets • direct invitation • local, state or territory, and national newspapers • local notices • online • word of mouth.
Results may be advised to candidates:	• in writing • in person • by telephone.
Contracts may include:	• award-based contracts • verbal or written agreements • workplace agreements.
Induction processes may include:	• community profile • job description • organisational structure • meeting staff/team • on-the-job training • policies and procedures • roles and responsibilities • tour of the organisation.
Development and training may include:	• accredited and non-accredited training • career planning

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RANGE STATEMENT	
	• cross-cultural training • mentoring.
Staff departures may refer to:	• dismissal • redeployment • resignation • retirement • retrenchment.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIW416C Obtain and manage consultancy services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to obtain and manage consultancy services. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who are responsible for obtaining and managing external experts to assist in the activities of the organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish the need for external advice	1.1. Identify required ***expertise*** not available in the organisation 1.2. Identify potential funding sources to purchase outside expertise
2. Prepare terms of reference	2.1. Form a management group to oversee the project 2.2. Prepare ***terms of reference*** (consultancy brief) for consultant services 2.3. Identify and include opportunities for paid community involvement where appropriate
3. Select a consultant	3.1. Advertise terms of reference for the consultancy 3.2. Establish a process for short listing, including appointment of a selection panel 3.3. Select the most suitable applicant according to the organisation's requirements, policies and procedures 3.4. Ensure successful and unsuccessful applicants are advised of the outcome and provided with feedback 3.5. Ensure appropriate procedures are in place to document the selection process and outcome
4. Develop a contract	4.1. Obtain legal advice on contract requirements 4.2. Ensure a draft contract is prepared in accordance with legal advice that outlines what is required of the consultant

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ELEMENT	PERFORMANCE CRITERIA
5. Brief the consultant	5.1. Clarify the board's requirements with the consultant 5.2. Negotiate final details of the project with the consultant, including expectations of performance and outcomes 5.3. Ensure the contract is finalised and signed 5.4. Familiarise the consultant with the organisation and its personnel
6. Monitor consultant's performance	6.1. Check that reports are received from consultant according to contractual requirements 6.2. Evaluate reports against agreed outcomes and follow up issues where required 6.3. Participate in performance reviews against contract requirements 6.4. Ensure progress payments are made against milestones and key performance indicators 6.5. Ensure final payment is made when contract requirements have been met

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication, teamwork and negotiation skills to work cooperatively with consultants, other board members, management and staff of the organisation, members, community and key stakeholders • communication skills to provide feedback on performance • culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities • evaluation and decision-making skills to monitor and review information presented to the board and enact decisions • problem-solving skills to identify and manage performance issues • organisational and planning skills to plan project and costings
Required knowledge
• concept of community control of organisations and how it may have an impact on the selection of a consultant • cultural context in which Aboriginal and Torres Strait Islander boards operate,

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REQUIRED SKILLS AND KNOWLEDGE
including their role in upholding traditional and cultural values, and how this might have an impact on the selection of a consultant • development and typical content of terms of reference, milestones and performance indicators • equity and diversity principles as they apply to selecting consultants • external skill or competency needs required by the organisation • forms of contract and contractual obligations for consultants • geographic, social, economic and political contexts in which particular organisations operate and how these may impact on the selection of a consultant • recruitment and selection processes in relation to obtaining consultancy services • relevant protocols and cultural responsibilities when engaging a consultant • sources of legal advice available and how they can be accessed

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • obtainappropriate consultancy services that meet legal and organisational requirements • monitor and review consultant's performance against relevant criteria • provide feedback on consultant's performance.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of situations where boards may seek consultancy services • access to examples of relevant documents • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

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EVIDENCE GUIDE	
	• observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays • analysis of feedback from consultants, board members and staff regarding performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Expertise:	• may include:
	  • accounting
	  • business development
	  • community planning
	  • legal
	  • training
	  • planning
	  • research
	• may involve:
	  • evaluating services and procedures
	  • solving major problems
	  • writing submissions
	  • writing policy and procedures.

Terms of reference may include:	• community aims

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RANGE STATEMENT	
	• community involvement • expenses • payment schedule • reporting requirements • required outcomes and key performance indicators • reviews • timelines.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIW417C Select and use technology

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assess, use and evaluate new technologies for the benefit of the organisation. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals responsible for monitoring and guiding the activities of an organisation that is anticipating the introduction of new technologies to the workplace.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Assess technology needs	1.1. Identify organisational tasks that could be helped by ***technology*** 1.2. Undertake a cost-benefit analysis 1.3. Seek independent technical advice as necessary
2. Acquire technology	2.1. Investigate costs of acquiring technology 2.2. Investigate ways of acquiring or ***accessing technology*** other than by funding 2.3. Investigate sources of funding for technology purchases and associated costs 2.4. Seek funds required for purchase of technology and associated costs
3. Ensure staff are prepared for new technology	3.1. ***Evaluate*** the need for technology training 3.2. Identify suitable trainers and/or mentors to support staff to use the new technology 3.3. Ensure suitable training is provided for staff who will use the technology
4. Evaluate the use of technology	4.1. Develop strategies to ensure the new technology is used within the organisation 4.2. Evaluate whether technology is used effectively and meets organisational needs 4.3. Identify barriers to the effective use of the technology

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ELEMENT	PERFORMANCE CRITERIA
	4.4. Develop and implement actions to address barriers to its effective use

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication, teamwork and negotiation skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders • culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities • evaluation and decision-making skills to monitor and review information presented to the board and enact decisions • mentoring skills to support staff using the technology • planning skills to organise appropriate training and support for staff • problem-solving skills to identify and manage issues that may arise in the use of the technology
Required knowledge
• basic principles of cost-benefit analysis • cultural context in which Aboriginal and Torres Strait Islander boards operate, and how that may impact on the selection and use of technology • equipment and funding sources • geographic, social, economic and political contexts in which particular organisations operate and how these may impact on the selection and use of technology • potential barriers to learning, and strategies to address these • provisions of federal, state or territory legislation and funding body requirements that may impact on the purchase, use and disposal of assets • range of technology options available to support organisational activities • relevant protocols and cultural responsibilities when supporting members of staff • strategies that can be used to evaluate information regarding technology • training options available to the organisation to develop skills in the use of technology

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • choose appropriate technology to support the organisation's activities • identify suitable training options to support the introduction of new technology • develop strategies to ensure technology is used effectively within the organisation.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of technology used in workplaces • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays • analysis of feedback from the staff, board members and others regarding performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIM420A Oversee asset management.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Technology may include:	• computer software packages • information technology • new generation plant and equipment.
Options to ***access technology*** may include:	• borrow • lease or hire • obtain donations • partnership arrangements • purchase.
Evaluation may relate to:	• effectiveness, including cost effectiveness • human impacts • level of training need • reliability • suitability • sustainability.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBATSIW514C Represent your organisation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required for board members to represent their organisation in a range of situations, including in the community, government and private sector and through establishing relevant networks. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who contribute their skills and knowledge to monitoring and guiding the activities of the organisation and who are responsible for representing their organisation in a range of forums.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Obtain authorisation and act ethically	1.1. Obtain permission to ***represent*** the organisation 1.2. Undertake activities within the limits of the board role 1.3. Follow a ***code of conduct***
2. Become informed about organisational policies, current operations and relevant local politics	2.1. Describe and explain the organisation's current policies and operations 2.2. Obtain information about external politics that might affect the organisation
3. Develop and participate in networks	3.1. Identify and establish links with individuals, groups and ***organisations*** relevant to the work of the organisation 3.2. Participate in ***networks*** relevant to the organisation
4. Receive and provide information relating to the work of the organisation	4.1. Provide information to others about board decisions, developments and activities of the organisation 4.2. Gather information about relevant activities in the community and wider community 4.3. Follow protocols with respect to the community and wider community
5. Promote the work of the organisation	5.1. ***Inform*** the community, other organisations, government and businesses about the work and achievements of the organisation 5.2. Seek support for the organisation's work from

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ELEMENT	PERFORMANCE CRITERIA
	appropriate people and organisations 5.3. Present information in a manner that enhances the organisation achieving its objectives
6. Be accountable to the board	6.1. Ensure appropriate confidentiality of the organisation's information 6.2. Provide information and feedback to the board

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication, teamwork and negotiation skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- networking skills to establish links with other organisations and networks
- oral and written communication skills to share and gather information
- problem-solving skills to identify and manage potential conflict of interest
- public-speaking skills to represent the organisation
- technology skills to use technology to present information

Required knowledge

- business ethics, including codes of conduct
- concept of community control of organisations and how it may impact on how the organisation is represented
- cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that might impact on how the organisation is represented
- geographic, social, economic and political contexts in which particular organisations operate and how these may impact on how the organisation is represented
- organisational policies and processes in relation to representing the organisation
- personal role and responsibilities as a board member
- presentation techniques to provide information on the organisation

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REQUIRED SKILLS AND KNOWLEDGE
• relevant networks and media outlets • relevant protocols and cultural responsibilities that impact on how the organisation is represented • strategies for advocating on behalf of the organisation and its members • techniques to effectively represent the organisation in interviews

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • follow relevant protocols and codes of conduct with respect to representing the organisation • provide information about the organisation to others in a manner that promotes the work of the organisation • provide information and feedback received to other board members.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of relevant documents • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated board • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques

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EVIDENCE GUIDE	
	• observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays • analysis of feedback from other board members, staff, community or other stakeholders regarding performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIL512A Be a leader in the community.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Representation may involve:	• advocacy for the organisation
	• meeting with representatives of government or other organisations
	• participating in:
	  • forums or meetings
	  • media interviews
	  • networks
	• speaking in public forums
	• writing articles for publication.

Codes of conduct may include:	• appropriate behaviours • diligence • honesty • separating personal and professional issues.
Organisations may include:	• Aboriginal and Torres Strait Islander organisations • community-based services • local, state or territory, and federal government departments

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RANGE STATEMENT	
	• non-Indigenous organisations • peak bodies • private businesses.
Networks may include:	• section-focused organisations (e.g. health, education, justice) • local, regional, state or territory, and national organisations.
Informing methods may include:	• interviews • media, both Aboriginal and Torres Strait Islander and mainstream • networks • news releases • public meetings.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBATSIW515C Secure funding

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to locate funding sources, make submissions and lobby to maximise the organisation's chances of securing funds for its activities. Some aspects of governance activities may be subject to legislation, rules, regulations and codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals responsible for monitoring and guiding the activities of the organisation and securing funding for it to be able to undertake these activities.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify and contact funding bodies	1.1. Identify and investigate mainstream and Aboriginal and Torres Strait Islander funding sources 1.2. Gather information about potential funding bodies' priorities, key areas and expected outcomes 1.3. Clearly explain organisational funding requirements to potential funding bodies
2. Prepare a case for funding	2.1. Form a team to oversee the funding ***submission*** 2.2. Delegate tasks to staff if appropriate 2.3. Determine if consultant services should be engaged to provide technical assistance in preparing the case for funding 2.4. Ensure a proposal is prepared that meets the funding body's objectives, criteria and submission requirements 2.5. Ensure all existing financial obligations with respect to the funding body are up-to-date
3. Promote the case for funding	3.1. Use networks to lobby the funding body where appropriate 3.2. Seek representation with the funding body if necessary 3.3. Advise ***key people*** of the progress and outcome of the submission

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ELEMENT	PERFORMANCE CRITERIA
4. Appeal if necessary	4.1. Identify relevant appeal authorities and procedures for funding bodies 4.2. Determine whether an appeal should be made if a funding submission is not successful 4.3. Use the appeal system if required

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to identify funding body requirements and determine if funding proposals meet requirements
- communication, teamwork and negotiation skills to work cooperatively with other board members, management and staff of the organisation, members, community and key stakeholders
- culturally appropriate communication skills to relate to people from diverse backgrounds and with diverse abilities
- evaluation and decision-making skills to monitor and review information and enact decisions
- planning and prioritising skills to:
  - delegate tasks to others
  - ensure funding applications are submitted within required timeframe
- networking and lobbying skills to identify potential funding sources and gain support for applications
- research skills to identify potential funding bodies and analyse their requirements

Required knowledge

- appeal procedures available if funding submission is rejected
- concept of community control of organisations and how it may impact on how funding is sourced and used
- cultural context in which Aboriginal and Torres Strait Islander boards operate, including their role in upholding traditional and cultural values, and how that may impact on how funding is sourced and used
- funding sources and their requirements
- geographic, social, economic and political contexts in which particular organisations operate and how these may impact on how funding is sourced and

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REQUIRED SKILLS AND KNOWLEDGE
used • organisationalpolicies and procedures in relation to obtaining funding • provisions of federal, state or territory legislation and funding body requirements that impact on how funds may be sourced and used • relevant consultancy services to support funding submissions • relevant protocols and cultural responsibilities that impact on how funding is sourced

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • identify possible sources of funding for organisational activities • identify required components of funding submissions • evaluate whether a funding submission meets the funding body's requirements • follow appeal procedures if required.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated board • access to examples of projects requiring funding • access to the internet or other sources of information about funding bodies • access to examples of relevant documents • knowledge and performance are assessed over time to confirm consistency in performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance on a board or simulated

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EVIDENCE GUIDE	
	board • analysis of actual or simulated funding submission • direct questioning combined with reflection of practical board performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations and group discussions • oral or written questioning to assess knowledge • observation of performance in role plays • analysis of feedback from other board members, staff, community or other stakeholders regarding performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIM511C Develop enterprise opportunities.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Submission requirements may include:	• demonstrable outcomes • development of costs • eligibility criteria • meeting timelines • participation of certain groups, such as women and youth.
Key people may include:	• board or committee members • community members • Elders • management and staff • partner organisations • traditional owners.

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - ATSI governance

Co-requisite units

Co-requisite units		

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BSBAUD402B Participate in a quality audit

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to prepare for and participate in a quality audit as a member of a quality audit team. The process includes reviewing designated documentation; identifying and developing checklists and audit related documentation; preparing audit schedules; gathering, analysing and evaluating information; and reporting findings to the lead auditor. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a team audit environment who analyse and evaluate information from a variety of sources to provide solutions to auditing issues, including unpredictable quality auditing problems. The types of audit may include an external or internal systems audit or process or product/service audit. A broad knowledge of quality auditing is required for this unit. Leading an audit team is addressed by BSBAUD503B Lead a quality audit.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Review auditee documentation	1.1. Where applicable, review auditee's previous quality audits to establish possible impact on the conduct of the current audit 1.2. Request relevant organisational documents from auditee, and review and check the adequacy of these documents 1.3. Amend reviewed documents, and determine and source any further documentation required 1.4. Resolve issues which arise with auditee and relevant parties
2. Participate in developing audit schedules	2.1. Access or prepare appropriate checklists/tools and audit related documentation 2.2. Confirm schedules and required resources with auditee before beginning auditing activities

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Anticipate possible issues and outline strategies to address these issues, should they arise 2.4. Ensure preparation activities and documentation correspond to the ***audit plan*** 2.5. In consultation with auditing team, determine appropriate ***methods and techniques*** 2.6. Assist lead auditor in creating entry and exit meeting agendas
3. Gather and analyse information	3.1. Access a range of potential ***sources of information*** 3.2. Collect and make an initial assessment of ***sample documentation*** 3.3. Interview ***appropriate persons*** in relation to ***relevant documentation*** 3.4. Identify and report patterns, trends, interrelationships and areas of risk 3.5. Identify aspects of the audit that require the use of specialists and request appropriate assistance
4. Evaluate information	4.1. Evaluate information against prescribed benchmarks 4.2. Form a defensible opinion as to the meeting of these benchmarks by the auditee 4.3. Ensure opinions are formed from and supported by available information
5. Report findings	5.1. Formulate findings and prepare a corrective action report if discrepancies or non-compliances are detected 5.2. Examine results/findings against audit objectives and present to lead auditor 5.3. Report recommendations for improvements as applicable
6. Participate in exit meeting	6.1. Prepare for exit meeting 6.2. Ensure reporting arrangements are agreed upon and documented during the meeting 6.3. Ensure context and consequences of audit are explained, and follow-up is discussed

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to listen to clients and other audit team members and to clarify points with them as necessary
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- interpersonal skills to establish rapport with clients and to liaise with other audit team members
- literacy skills to read, write, edit and proofread documents to ensure clarity of meaning, accuracy and consistency of information
- organisational and time management skills to sequence tasks, meet timelines and arrange meetings
- problem-solving skills to identify any issues that have the potential to impact on the auditing process or outcome and to develop options to resolve these issues when they arise
- teamwork skills
- technology skills to use a range of equipment required to conduct quality auditing activities.

Required knowledge

- auditing codes of practice or ethics
- auditing methods and techniques
- auditing regulations and standards including:
  - AS/NZS ISO 9000:2006 Quality management systems - Fundamentals and vocabulary
  - AS/NZS ISO 19011:2003 Guidelines for quality and/or environmental management systems auditing
- current audit practices
- industry products and/or services
- quality auditing principles and techniques
- relevant legislation affecting business operation, including appropriate occupational health and safety, environmental, and privacy legislation
- terminology relating to quality auditing.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the

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EVIDENCE GUIDE	
performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • preparation of multiple audit plans for a range of quality audits containing information on the audit schedule, proposed activities, methods, and techniques; risk analysis and proposed treatment of identified risks; entry and exit meeting agendas • participation in audits as a member of an audit team • gathering of data and information by a variety of methods • knowledge of relevant legislation and national standards • developing a comprehensive report for the exit meeting, which analyses findings and information gathered to arrive at the findings.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace undertaking a quality audit or a simulated workplace environment • access to workplace documentation including previous quality audit reports, checklists, risk management plans and audit plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence by third party workplace reports of on-the-job performance by the candidate • demonstration of quality auditing techniques • observations of participation in exit meetings • oral or written questioning to assess knowledge of audit preparation activities • assessment of organisational documentation reviewed for the audit • analysis of reports developed - with clear, comprehensive findings • observation of performance in role plays.
Guidance information for	Holistic assessment with other units relevant to the

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EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended, for example: • other quality auditing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Audit plan may include:	• audit requirements and/or identification of relevant quality system documentation • auditee provision of personnel for audit • confidentiality requirements • contingency actions • distribution of reports • entry meeting • exit meeting • follow-up procedures • measurement criteria • reporting procedures • resource requirements • safety of auditors • sampling techniques • scope and objectives of audit • time lines and schedules
Methods and techniques may include:	• advanced management information systems • analysis • determining information flows • evaluating the effectiveness of system controls • questioning • sampling • scanning • tracing • trend analysis

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RANGE STATEMENT	
Sources of information may include:	• activities • internal documentation • interview results • records, such as meeting minutes, reports or log books • reports from external sources, such as external laboratory reports and vendor ratings
Appropriate persons may include:	• persons from different levels within the auditee's organisation such as management, administrative personnel and work floor personnel • persons performing activities or tasks under consideration in the audit process
Sample documentation may include:	• documented procedures • log books • meeting minutes • previous audit reports • reports • reports from external sources • systems specifications • test results • user requirements definitions • work instructions
Relevant documentation may include:	• audit procedures • checklists • forms for documenting conformance and non-conformance evidence • forms for recording information • organisational charts • previous audit reports • quality standards • records of meetings • sampling plans defined in documented procedures or in audit plan • schedules

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Quality Auditing

Co-requisite units

Co-requisite units		

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BSBAUD501B Initiate a quality audit

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to initiate and organise a quality audit with an auditee. It covers assessing the scope and objectives of a quality audit; communicating with the auditee regarding the proposed quality audit; identifying resources required to conduct the audit; and developing and submitting a quality audit plan. The types of audit may include an external or internal systems audit or process or product/service audit. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with well established, sound theoretical knowledge base in quality auditing who are proficient in using a wide range of specialised quality auditing and managerial techniques to plan, carry out and evaluate a quality audit, their own work and that of others working under their direct supervision in a quality audit team.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Assess quality audit scope and objectives	1.1. Determine and discuss ***audit objectives*** with the auditee, client and all other relevant parties 1.2. Determine and discuss ***scope*** of the quality audit with the auditee, client and all other relevant parties 1.3. Identify ***relevant standards*** that impact on the environment in which the audit operates 1.4. Determine scope commensurate with identified risks
2. Communicate with auditee regarding proposed quality audit	2.1. Determine audit history, organisational structure and culture through consultation with the auditee 2.2. Negotiate and ensure agreement with auditee, the proposed ***audit methods and techniques*** to be applied 2.3. Outline audit processes to establish sequence of

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ELEMENT	PERFORMANCE CRITERIA
	audit activities, and the roles of the auditors and auditees in the process
3. Identify resources required to conduct quality audit	3.1. Identify ***resources*** required to perform the quality audit efficiently and effectively 3.2. Select audit team members on the basis of relevant expertise 3.3. Confirm availability of resources required to conduct the audit with auditee 3.4. Assign roles and responsibilities to audit team members
4. Develop and submit quality audit plan	4.1. Develop ***quality audit plan*** according to established scope and objectives 4.2. Assign timing, schedules and responsibilities for implementation of the audit plan 4.3. Develop audit priorities and ensure agreement with auditees and audit team members 4.4. Document and submit audit plan to auditee
5. Prepare audit team	5.1. Inform audit team members of their responsibilities, audit objectives and scope 5.2. Communicate audit plan and schedules to all audit team members 5.3. Discuss and clarify audit methods and techniques with audit team members
6. Review auditee documentation	6.1. Review auditee's previous audits to establish possible impact on the conduct of the current audit 6.2. Review and check relevant organisational documents for accuracy 6.3. Resolve arising problems with auditee and relevant parties
7. Identify and prepare checklists and audit related documentation	7.1. Develop checklists to reflect audit scope and objectives 7.2. Develop or obtain documentation required for the audit 7.3. Prepare agenda for entry meeting 7.4. Include value-adding activities in audit related documentation where required

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to listen to and question clients and other audit team members
- culturally appropriate communication skills to relate to people from diverse backgrounds and abilities
- interpersonal skills to establish rapport with clients and to liaise with other audit team members
- literacy skills to read, write, edit and proofread documents to ensure clarity of meaning, accuracy and consistency of information
- organisational, planning and time management skills to sequence tasks, meet time lines, conduct inspections and arrange meetings
- problem-solving skills to overcome any issues which may potentially affect the auditing process or outcome
- teamwork skills
- technology skills to use equipment required to conduct quality auditing activities.

Required knowledge

- auditing codes of practice or ethics
- auditing methods and techniques
- auditing regulations and standards, including:
  - AS/NZS ISO: 9000:2006: Quality management systems - Fundamentals and vocabulary
  - AS/NZS ISO 19011:2003: Guidelines for quality and/or environmental management systems auditing
- current audit practices
- industry, product and/or service knowledge
- quality auditing principles, techniques and systems
- requirements of house or other style manual protocols for written communications
- relevant legislation affecting business operations including appropriate occupational health and safety, environmental, and privacy legislation
- software applications relevant to conducting quality auditing activities
- terminology relating to quality auditing.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documented audit plans for auditees across a variety of contexts including the scope and objectives of the audit, proposed audit methods and techniques to be used, required resources and schedules, and allocation of individual audit team member responsibilities for conducting the proposed audit • knowledge of relevant legislation, national standards and compliance issues.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation including previous quality audit reports, checklists, risk management plans and audit plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence by third party workplace reports of on-the-job performance by the candidate • review quality auditing documentation • demonstration of quality auditing techniques in a workplace • observations of interactions with team members and colleagues • observations of presentations of audit plans • oral or written questioning to assess knowledge of auditing codes of practice or ethics • assessment of audit plan.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other quality auditing units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Audit objectives may include:	• compliance with contractual and/or legislative requirements • evaluation of follow-up corrective action since previous audit • evaluation of level of compliance of auditee's activities, systems, processes, products or services with quality system's objectives • identifying areas of potential improvement • measuring performance in achieving quality objectives and confirming the effectiveness of the implemented quality system in meeting specified objectives
Scope may include:	• depth and focus of audit • industry specific issues, for example seasonal factors • legal and regulatory issues • organisational customs and protocols • products, services, processes and/or activities to be audited • sites • standards to be applied
Relevant standards may include:	• industry standards • professional standards • regulations • relevant legislation
Audit methods and techniques may include:	• analysis • determining information flows • evaluating the effectiveness of system controls • questioning • sampling • scanning • tracing • trend analysis

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RANGE STATEMENT	
Resources may include:	• auditee-provided resources • experience and technical expertise of auditors • facilities • financial requirements • number of auditors required • reference materials • time • travel and accommodation
Quality audit plan may include:	• audit requirements and/or identification of relevant quality system documentation • auditee provision of personnel for audit • confidentiality requirements • contingency actions • distribution of reports • entry meeting • exit interview • follow-up procedures • measurement criteria • reporting procedures • resource requirements • roles and responsibilities of auditors • safety of auditors • sampling techniques • scope and objectives of audit • time lines and schedules

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Quality Auditing

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Co-requisite units

Co-requisite units		

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BSBAUD503B Lead a quality audit

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to lead an audit team as they undertake a quality audit. It covers conducting entry and exit meetings; identifying and gathering relevant information; managing audit team resources; and providing feedback to audit team members on their performance. The types of quality audit that may be covered by this unit include an external or internal systems audit or process or product/service audit. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with well established, sound theoretical knowledge base in quality auditing who are proficient in using a wide range of specialised quality auditing and managerial techniques to carry out their own work and to supervise the quality audit team. The unit is relevant to audits where a lead auditor is responsible for a quality audit team.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Conduct entry meeting	1.1. Organise entry meeting in advance at a mutually agreed time 1.2. Prepare agenda for audit 1.3. Confirm objectives and scope of audit at entry meeting 1.4. Confirm schedules and logistical arrangements at entry meeting 1.5. Make changes to plan, schedules and arrangements where required
2. Identify and gather information	2.1. Identify a range of potential ***sources of information*** 2.2. Interview ***appropriate persons*** 2.3. Gather relevant information and ***sample documentation***

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ELEMENT	PERFORMANCE CRITERIA
3. Manage audit team resources	3.1. Supervise activities of audit team members 3.2. Assess and review audit team findings in line with audit scope 3.3. Re-assign team members as required 3.4. Instigate contingency actions as required 3.5. Seek and reach agreement on corrective action reports
4. Conduct exit meeting	4.1. Make preparations for exit meeting 4.2. Examine results and findings against audit objectives and present to auditee 4.3. Ensure reporting arrangements are agreed upon 4.4. Explain context and consequences of audit and discuss during follow-up
5. Guide team members in continuously improving their performance	5.1. Provide feedback on performance to audit team members 5.2. Encourage and support audit team members to critique their own work 5.3. Provide and document advice for individual improvement

Required Skills and Knowledge

Required knowledge

• auditing codes of practice or ethics
• auditing methods and techniques
• auditing regulations and standards, including:
  • AS/NZS ISO: 9000:2006: Quality management systems - Fundamentals and vocabulary
  • AS/NZS ISO 19011:2003: Guidelines for quality and/or environmental management systems auditing
• current audit practices
• industry, product and/or service knowledge
• quality auditing principles, techniques and systems
• requirements of house or other style manual protocols for written communications
• relevant legislation affecting business operations including appropriate occupational health and safety, environmental, and privacy legislation
• software applications relevant to conducting quality auditing activities
• terminology relating to quality auditing.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of leadership and management of a quality auditing team across quality audits in a variety of contexts • management of the information gathering process by team members, and analysis, synthesis and reporting of the findings • knowledge of auditing methods and techniques.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation including previous quality audit reports, checklists, risk management plans and audit plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of information gathered in the information gathering process • review of audit plans • direct questioning combined with review of portfolios of evidence by third party workplace reports of on-the-job performance by the candidate • observations of application of audit techniques • observations of interactions with team members, colleagues and auditees • oral or written questioning to assess knowledge of current audit practices • review of documentation advising team members about improving their performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

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EVIDENCE GUIDE	
	• other quality auditing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Sources of information may include:	• examination of internal documentation • examination of reports from external sources, for example external laboratory reports and vendor ratings • inspection of records, for example meeting minutes, reports or log books • interviews • observation of activities
Appropriate persons may include:	• persons from different levels within the auditee's organisation, for example management, administrative personnel and work floor personnel • persons performing activities or tasks under consideration in the audit process
Sample documentation may include:	• documented procedures • log books • meeting minutes • previous audit reports • reports • reports from external sources • systems specifications • test results • user requirements definitions • work instructions

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Quality Auditing

Co-requisite units

Co-requisite units		

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BSBAUD504B Report on a quality audit

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to report on the outcomes of a quality audit and to take appropriate follow up action. It covers compiling audit results; preparing a report for the auditee/client; negotiating follow up action with the auditee/client; and monitoring and reviewing auditing system and activities. The types of quality audit that may be covered by this unit include an external or internal systems audit or process or product/service audit. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with well established, sound theoretical knowledge base in quality auditing who are proficient in using a wide range of specialised quality auditing and managerial techniques to carry out their own work and to supervise the quality audit team. The unit addresses the function performed by either an auditor having sole responsibility for the audit or a lead auditor of a quality audit team.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Compile audit results	1.1. Compare ***results*** of audit evaluation against audit objectives and criteria 1.2. Analyse audit results
2. Prepare report	2.1. Provide objective evidence relating to the need for reduction, elimination and prevention of non-conformance as the basis for the ***audit report*** 2.2. Produce audit report according to specified audit requirements 2.3. Present audit report to auditee and other stakeholders
3. Negotiate follow up process with auditee	3.1. Determine and initiate any corrective action required to deal with non-conformance, in consultation with auditee 3.2. Provide suggestions for improvements where

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ELEMENT	PERFORMANCE CRITERIA
	applicable 3.3. Ensure time lines are agreed upon for completion of corrective action activities 3.4. Ensure corrective action follow-up procedures are agreed with auditee
4. Monitor and review audit system and activities	4.1. Evaluate effectiveness and suitability in achieving audit objectives 4.2. Investigate possible ***improvements in audit methods***, economy and efficiency

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to listen to and question, clients and other audit team members
- culturally appropriate communication skills to relate to people from diverse backgrounds and abilities
- interpersonal skills to establish rapport with clients and to liaise with other audit team members
- literacy skills to read, write, edit and proofread documents to ensure clarity of meaning, accuracy and consistency of information
- organisational, planning and time management skills to sequence tasks, meet time lines, conduct inspections and arrange meetings
- problem-solving skills to overcome any issues which may potentially affect the auditing process or outcome
- teamwork skills
- technology skills to use a range of equipment required to conduct quality auditing activities.

Required knowledge

- auditing codes of practice or ethics
- auditing methods and techniques
- auditing regulations and standards, including:
  - AS/NZS ISO: 9000:2006: Quality management systems - Fundamentals and vocabulary
  - AS/NZS ISO 19011:2003: Guidelines for quality and/or environmental

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REQUIRED SKILLS AND KNOWLEDGE
management systems auditing • current audit practices • industry, product and/or service knowledge • quality auditing principles, techniques and systems • requirements of house or other style manual protocols for written communications • relevant legislation affecting business operations including appropriate occupational health and safety, environmental, and privacy legislation • software applications relevant to conducting quality auditing activities • terminology relating to quality auditing.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • completion and presentation of audit reports to auditees/clients and stakeholders • negotiations for follow-up actions with auditees/clients • knowledge of auditing regulations and standards.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation including quality audit reports, checklists, risk management plans and audit plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of objective evidence provided in relation to the need for reduction, elimination and prevention of non-conformance • review of audit reports • direct questioning combined with review of portfolios of evidence by third party workplace

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EVIDENCE GUIDE	
	reports of on-the-job performance by the candidate • analysis of documentation outlining possible improvements in audit methods • observations of interactions with team members, colleagues and auditees • observations of presentations of audit reports to auditees and their organisation • oral or written questioning to assess knowledge of audit report contents • review of corrective action follow-up procedures agreed with auditee.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other quality auditing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Results may include:	• corrective actions to reduce, eliminate and prevent non-conformance • examination and evaluation of controls associated with systems, activities and processes • means of improving processes, systems, products and business results • objective evidence of conformance • objective evidence of non-conformance relating to organisational processes, systems, activities, products and/or services
Audit report may include:	• agreed objectives and scope of audit • audit results • distribution list for the audit report

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RANGE STATEMENT	
	• follow-up required • identification of audit team members • identification of the auditee's representatives • information on confidentiality • outline of the auditing process, including obstacles encountered • retention of auditing records, including work documents • specified audit requirements • timeframe in which audit was conducted
Improvements in audit methods may include:	• assessment of audit results • evaluation of auditor performance • evaluation of the effect of the quality audit outcomes on the auditee's activities, products and/or services • examination of complaints, appeals and other feedback received from auditee • examination of mechanisms by which consistency of audits is achieved • overall evaluation of the methods and effectiveness of the audit organisation • review of the audit reporting process and records

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Quality Auditing

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Co-requisite units

Co-requisite units		

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BSBCCO203A Conduct customer contact

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to respond effectively to customer contact.

Competence in this unit requires responding to a wide range of customer enquiries and contacts over a variety of communication methods. Compliance with organisational, legislative and regulatory requirements is required, as is the ability to respond in a manner that meets both customer and business needs.

Application of the Unit

This unit applies in customer contact environments where a variety of communication channels and technologies are used and contact is inbound or outbound.

This work is undertaken with some supervision and guidance.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria

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Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Prepare for customer contact	1.1 Obtain and study product or service details relating to ***customer contact***
	1.2 Study prepared ***contact guides or scripts***
	1.3 Locate ***sources of information*** that may be required to develop ***product and service expertise***
	1.4 Develop a clear understanding of ***enterprise policies and procedures*** and personal targets or key performance indicators (KPIs)
	1.5 Develop proficiency with ***equipment and systems*** to effectively and efficiently manage contact
	1.6 Clarify details as required with relevant personnel
2. Provide quality service in response to customer queries	2.1 Use ***technology*** to respond to customer queries
	2.2 Greet customer according to enterprise protocol and in a manner that encompasses cultural diversity
	2.3 Establish and clarify customer needs
	2.4 Satisfy customer needs promptly, efficiently and effectively to maximise customer satisfaction and minimise delays and the need to refer customer elsewhere
	2.5 Respond to customer concerns in a positive manner and in line with enterprise policy for complaint resolution
	2.6 Treat customer with respect and courtesy, and enhance and develop customer loyalty
	2.7 Complete follow-up action according to contact escalation policy, timeframes, business rules and practices, and in line with customer expectations
3. Arrange provision of a product or service	3.1 ***Respond appropriately*** to customer requirements and identify relevant options
	3.2 Select appropriate product or service in consultation with customer

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	3.3 Agree actions or orders with customer giving consideration to maximising value and service delivery to customer 3.4 Consider ***customer retention options*** that can be applied to the contact 3.5 Use clear, simple and easy to understand language and ensure responses are comprehensive
4. Respond to customer enquiries	4.1 Adapt to the requirements and expectations of various customers when working in an ***outsource environment*** and dealing with multiple customer bases 4.2 Escalate enquiries or orders that cannot be satisfied immediately 4.3 Supply follow-up information to customer as required and in a timely manner 4.4 Observe ***organisational regulations and standards*** throughout transaction 4.5 Record details of contact according to policy 4.6 Record and report difficulties not escalated but that may present an opportunity for continuous improvement

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to articulate effectively over the required channels
- customer service skills to deliver required level and quality of customer service
- interpersonal and communication skills to:
  - establish rapport and build relationships with customers from a range of backgrounds
  - handle difficult customers
  - listen and question to understand and clarify the needs of customers
  - use clear, simple and easy to understand language
- numeracy skills to analyse, calculate and validate data
- planning and organising skills to manage own tasks within required timeframes
- self-management skills to:
  - comply with policies and procedures
  - manage stress
  - seek learning and development opportunities

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- time-management skills to handle peak periods of activity in a positive and enthusiastic manner.

Required knowledge

- operational environment – customer base, company products and services
- organisational communication channels
- organisational performance and customer service expectations
- organisational policies, procedures, protocols and guidelines, including financial delegation policy
- principles of customer service
- stress and time-management techniques
- technology and systems.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to:
	• record data accurately
	• demonstrate knowledge of:
	  • enterprise products and services
	  • compliance requirements
	  • performance targets
	• meet agreed standards of contact
	• use technology, which may be modified for use by people with a disability.

Context of and specific resources for assessment	Assessment must ensure access to: • IT and telecommunications equipment • workplace information and data • performance management records and data • quality assurance guidelines and call/contact guides.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of

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	evidence and third-party workplace reports of on-the-job performance by the candidate • direct observation during contact (may be done by double jacking on telephone system) • review of documentation of performance against targets • review of quality assurance feedback • review of accuracy of data and record entry • oral and/or written questioning to assess knowledge of the enterprise, legislative and regulatory requirements, and products and services • observation of practical demonstration of sourcing required information.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO301B Use multiple information systems • BSBCUS301B Deliver and monitor a service to customers.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Customer contact may include:	• email and other electronic communications • face-to-face • facsimile • internal, external and outsourced customers • letter • telephone.
Contact guides or scripts may relate to:	• contact-closing technique • contact flow • features and benefits of product or service • greeting etiquette • pricing • regulatory, legislative and organisational requirements.
Sources of information may include:	• brochures and pamphlets • campaign briefs

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	• internet and intranet • instruction or product manuals.

Product and service expertise may include:	• knowledge of the features and functions of:
	  • goods, products and services
	  • ideas
	  • infrastructure
	  • private and public sets of benefits.

Enterprise policies and procedures may include:	• adherence to scheduling • financial and decision-making delegations • referral and escalation paths • scope of the services to be provided.
Equipment and systems may include:	• computer and telecommunications equipment, which may be modified for use by people with a disability • information management systems • workflow management systems.

Technology may include:	• multichannel communication, including:
	  • computer equipment
	  • telecommunications equipment.

Responding appropriately may include:	• recording details in enterprise systems • discussing, agreeing and recording supply arrangements with customers • discussing and agreeing on payment options with customers • conducting a credit check.
Customer retention options may include:	• loyalty programs or incentives • offering value-added services or products • re-contracting • special offers as determined by the enterprise from time to time.
Outsource environment may include customer contact environment:	• servicing customers of another enterprise or business unit by agreement • taking contacts for multiple enterprises • taking overflow calls for another enterprise.
Organisational regulations and standards may include:	• Consumer Credit Code • Do Not Call Register • equal employment opportunity and anti-discrimination legislation • freedom of information • industry-specific codes, regulations and legislation • occupational health and safety legislation • Privacy Act • Trade Practices Act/Competition and Consumer Act

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Unit Sector(s)

Stakeholder relations – customer service

Custom Content Section

Not applicable.

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BSBCCO204A Collect data

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to collect primary data for market research and opinion poll research activities by telephone or similar means.

Competence in this unit requires demonstration of effective data collection within organisational guidelines, developing rapport with customers to ensure the accuracy of data collected, and accurately recording data collected.

Application of the Unit

This unit applies in customer contact environments that engage in market research and data-collection activities using the telephone.

This work is undertaken with some supervision and guidance.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria

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Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Prepare for data collection	1.1 Study and clarify survey questions and ***contact guide***
	1.2 Discuss ***operational boundaries*** and fulfilment processes with relevant personnel
	1.3 Develop a clear understanding of the ***relevant legislation, codes, regulations and standards*** that apply to contact
	1.4 Develop proficiency in the use of the ***technology*** being used
	1.5 Identify source of contact targets
	1.6 Review and develop a clear understanding of the contact strategy
2. Conduct data collection for research/survey	2.1 Make contacts in the most efficient manner possible, following the contact guide within operational boundaries
	2.2 Establish customer availability and willingness to participate in research
	2.3 Inform customer of survey details, purpose and approximate time survey will take
	2.4 Record customer responses
	2.5 Answer customer queries or refer or escalate appropriately
	2.6 Observe relevant codes and regulations throughout contact
3. Record results	3.1 ***Record outcomes*** and present results according to policy
	3.2 Record, report and action difficulties encountered according to policy
	3.3 Assess and analyse performance against agreed targets
	3.4 Amend ***database*** where applicable

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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- interpersonal skills to engage customer to effectively respond to survey
- communication skills to:
  - communicate effectively
  - identify when clarification is required or if customer is not sure of question or response
- literacy skills to:
  - clearly articulate questions
  - record findings of survey
- numeracy skills to read and manipulate data
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities
- time-management skills to ensure call targets are achieved and work is prioritised.

Required knowledge

- data-collection techniques
- good market surveys or research practice
- enterprise policies, procedures and guidelines as they apply to customer contact and data collection
- relevant regulations and standards that apply to data collection
- operational systems and technology employed in data collection.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • meet agreed data-collection targets • apply prepared contact guide • record data demonstrate knowledge of relevant organisational codes,

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	regulations and standards that apply to data collection.
Context of and specific resources for assessment	Assessment must ensure access to: • workplace information and data • relevant standards and guidelines • performance management and quality assurance documentation and records.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of documentation of actual performance against target • direct observation of adherence to call/contact guide • review of accuracy and quality of data recorded • direct observation of dealing with difficult contact • review of quality assurance records.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO203A Conduct customer contact.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Contact guide may include:	• contact closing technique • contact flow • features and benefits of product or service • greeting etiquette • multichannel contact • regulatory and organisational requirements.
Operational boundaries may include:	• discretion to deviate from call/contact guide • guidelines and parameters within which a telemarketer can operate

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	• limits of contact with the customer • mandatory and voluntary requirements of data collection • relevant regulatory and organisational requirements.
Relevant legislation, codes, regulations and standards may include:	• Consumer Credit Code • Do Not Call Register • equal employment opportunity and anti-discrimination legislation • freedom of information • industry-specific codes, regulations and legislation • occupational health and safety legislation • Privacy Act • Trade Practices Act/Competition and Consumer Act
Technology may be modified for use by people with a disability and may include:	• telecommunications (e.g. telephone, business system) • computer systems • interactive medium • social networking websites, such as Facebook and Myspace.
Recording outcomes may include entry of data which may be:	• on prepared forms • paper-based • via electronic means, such as computer.
Database may include:	• business directories • enterprise records • sales records • telephone directories.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO205A Prepare for work in a customer contact environment

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to participate in customer contact operations.

Competence in this unit requires understanding of customer contact operations and requirements.

Application of the Unit

This unit applies to activity in a customer contact environment.

This work is undertaken with some supervision and guidance.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the	*Performance criteria describe the performance needed to*

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Element	**Performance Criteria**
essential outcomes of a unit of competency.	*demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Relate own role to customer contact operations	1.1 Identify ***specific customer contact operations*** and relate these to the industry-wide context 1.2 Identify how customer contact activity contributes to the organisation's goals 1.3 Identify personal customer contact role and operations 1.4 Identify personal ***performance requirements*** and expectations in relation to organisation's customer contact objectives 1.5 Identify the major components of the ***customer contact infrastructure*** 1.6 Relate personal operations to customer contact infrastructure
2. Reflect on personal performance	2.1 Recognise and use available resources and support effectively 2.2 Operate within reporting protocols, policies and procedures of customer contact organisational structure 2.3 Comply with ***regulatory and legislative requirements*** 2.4 Identify personal performance requirements and expectations
3. Maintain a professional approach to employment	3.1 Display a positive and ethical approach to employment and role 3.2 Identify realistic short- and long-term career objectives 3.3 Relate personal capabilities to current role and career objectives 3.4 Identify strategies for projecting a ***professional image*** in current role 3.5 Contribute to the promotion of the centre, organisation and its staff to customers
4. Participate in a workplace team	4.1 Identify team member roles and team structure 4.2 Interact cooperatively with team members

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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to articulate effectively in the work environment
- interpersonal skills to establish rapport and build relationships with clients, team members and stakeholders
- planning and organising skills to:
  - manage own tasks within required timeframes
  - set goals and achieve performance targets
- self-management skills to:
  - comply with policies and procedures
  - proactively strive and self-evaluate for high standards of performance and behaviour
  - seek learning and development opportunities
- teamwork skills to contribute positively to the team.

Required knowledge

- customer base, company products and services
- discipline required in a customer contact environment, including:
  - adherence to schedule
  - time keeping
- industry-specific regulatory and legislative requirements
- occupational health and safety (OHS) policies and guidelines
- operational systems used within scope of role
- organisational mission, business goals and standards
- scope of customer contact operations
- specific work role and key relationships.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to	Evidence of the ability to: • comply with organisational requirements

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demonstrate competency in this unit	• demonstrate professional performance in customer contact role • demonstrate effective teamwork • demonstrate knowledge of industry-specific regulatory and legislative requirements.
Context of and specific resources for assessment	Assessment must ensure access to: • relevant information, such as organisational policies, standard operating procedures, performance management guidelines, role position descriptions, and organisational charts • peer and line manager feedback • contact centre environment to observe performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • direct observation of the candidate working effectively within contact centre environment or simulated environment • oral and/or written questioning to assess knowledge of centre operations and own role • oral and/or written questioning to assess knowledge of regulatory and legislative requirements • review of quality assurance and training records • review of performance management and development documentation • review of peer and line manager feedback.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBWOR201A Manage personal stress in the workplace.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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Specific customer contact operations may include:	• customer support • data collection • information services • marketing • sales • service provision • combination of the above.
Performance requirements may include:	• adherence to schedule • call rates • conversion rates • customer satisfaction • data entry quality requirements • first contact resolution • quality targets • sales targets.
Customer contact infrastructure may include:	• automatic call distribution systems • contact management systems • physical contact centre environment • information technology networks and software systems • interactive voice recognition systems • internet and intranet services • other centre-specific systems • service level and call data reporting systems • security systems • telephony equipment.
Regulatory and legislative requirements may include:	• code of conduct • Do Not Call Register • industry-specific regulatory codes and guidelines • OHS • quality management and assurance • Privacy Act • Trade Practices Act/Competition and Consumer Act.
Professional image may include:	• appearance and dress standards • commitment to customer service • commitment to team and centre goals • manner of communications • positive and ethical attitude.

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Unit Sector(s)

Stakeholder relations – customer service

Custom Content Section

Not applicable.

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BSBCCO301B Use multiple information systems

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Use of database management system (DBMS) to control data access, enforce data integrity, manage concurrency, and access information incorporated into the performance criteria in line with the customer contact industry's escalated use of technology. Critical aspects reviewed to succinctly address the essence of the unit. Replaces BSBCCO301A Use multiple information systems

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to use multiple information systems to research information and records, and to maintain up-to-date customer information. This may involve navigation between information systems using multiple windows and the maintenance of systems data while interacting with a customer.

Competence in this unit requires proficiency in the use of systems to analyse, research and resolve customer enquiries. It also requires basic troubleshooting skills to identify and report on issues that may arise with systems.

Application of the Unit

This unit applies in customer contact environments where use of multiple information systems is required to resolve customer enquiries or complaints.

This work is undertaken with some supervision and guidance.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

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Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Access a range of information systems	1.1 Efficiently ***log on*** to ***information systems***
	1.2 Navigate screens efficiently to locate displays and information relevant to role
	1.3 Use a database management system (DBMS) to control data access, enforce data integrity, manage concurrency, and access information
	1.4 ***Manage use of information systems*** efficiently according to organisational requirements
2. Process customer information using multiple information systems	2.1 Analyse ***customer*** enquiry to identify ***information*** needs
	2.2 Identify information systems required to satisfy information needs
	2.3 Use information systems according to organisational processes to complete customer enquiry or transaction
	2.4 Record customer information in information systems to complete customer enquiry or transaction
	2.5 Use the shortest reasonable pathways to navigate between and within information systems
	2.6 Maintain contact and communication with the customer while operating information systems

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	2.7 Verify information with customer to complete transaction
3. Identify and rectify information system and processing errors	3.1 Identify ***errors*** in information system, relevant to role 3.2 Analyse errors for their impact on information system and customers 3.3 Identify source of errors, where possible 3.4 Consult with ***stakeholders*** to identify actions to rectify errors 3.5 Arrange rectification and confirm that amendments are accurate 3.6 Inform customers of errors and take necessary action 3.7 Identify information system faults and notify relevant personnel according to policy 3.8 Recommend procedural change according to policy

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to research, identify and use information effectively
- communication skills to maintain effective customer contact while using information systems
- interpersonal skills to establish rapport and build relationships with customers
- literacy skills to read, interpret and record information
- numeracy skills to read, validate and calculate data and information
- problem-solving skills to analyse and resolve issues with information systems
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities
- technology skills to use organisational information systems.

Required knowledge

- computer and system troubleshooting principles
- enterprise business systems and operating platforms relevant to role
- enterprise policies, procedures and guidelines regarding the use and security of information systems
- social networking websites, including Facebook and Myspace
- escalation process for reporting information technology issues.

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Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • apply checks to ensure data is captured and errors are rectified according to established procedures • demonstrate knowledge of enterprise policies, procedures and guidelines regarding the use and security of information systems • navigate systems to locate required information.
Context of and specific resources for assessment	Assessment must ensure access to: • relevant standards and guidelines for use of systems • workplace information and data • quality assurance and system user error reports • troubleshooting reports and escalation reports • work environment to observe operation of systems.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • direct observation of use of systems • review of data entry • feedback from quality assurance program • review of performance management reports • oral and/or written questioning to assess knowledge of systems and organisational security and operational requirements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Log on may include:	• complying with information technology security protocols • logging into telephone system • opening most frequently used applications • turning on computer equipment • username and passwords to access information systems.
Information systems may include:	• billing systems • databases • internet • intranet • telephone systems.
Manage use of information systems may include use of:	• bookmarks • decision support system • office automation system • transaction processing systems.
Customer may include:	• colleague • internal or external customer of the organisation • user, purchaser or beneficiary of a service, product or process.
Information may include:	• details required from core business systems or other sources in order to complete a transaction or process • specific details requested by a customer or others.
Errors may include:	• corrupt data • data in incorrect fields • inaccurate data • untimely entry of data.
Stakeholders may include:	• information technology department or help desk • marketing department • owners of database or system • team leader or manager • training department.

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Unit Sector(s)

Stakeholder relations – customer service

Custom Content Section

Not applicable.

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BSBCCO302B Deploy customer service field staff

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Critical aspects reviewed to succinctly address the essence of the unit. Replaces BSBCCO302A Deploy customer service field staff.

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to deploy field staff to fulfil service commitments to customers. It assumes the use of enterprise information systems in the deployment process.

Competence in this unit requires effective compilation, despatch and control of work requests to field staff according to organisational requirements and customer expectations.

Application of the Unit

This unit applies in customer contact environments where the effective deployment of field staff is a required customer service function.

This work is undertaken with some supervision and guidance.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Create a despatch job for automatic despatch	1.1 Identify the need to create a ***job*** despatch order 1.2 Determine the impact of this work on resources and its urgency, in consultation with appropriate areas, business protocols, regulatory and legislative requirements 1.3 Enter necessary details into the appropriate work management system to create and automatically despatch job 1.4 Confirm automatic despatch, where necessary
2. Manually despatch and clear jobs	2.1 Identify the need to ***manually despatch*** a job 2.2 Communicate ***job details*** clearly to field staff 2.3 Enter job details into the appropriate work management system
3. Re-deploy field staff	3.1 Identify the need to re-deploy resources according to agreed priority 3.2 Liaise with relevant stakeholders and team members 3.3 Deliver job to field staff in a timely manner 3.4 Maintain accurate records relating to resources and their deployment
4. Create and send communication to field staff	4.1 Identify need for ***communication*** and relevant customers 4.2 Create clear and concise communication according to ***business protocols*** 4.3 Check information for clarity and accuracy

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	4.4 Obtain appropriate approvals before sending communication 4.5 Coordinate and monitor responses to communications

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to:
  - work effectively with internal and external customers
  - listen in order to understand customer service deployment issues and undertake necessary action
- literacy skills to clearly articulate requirements in work requests
- numeracy skills to read and enter data
- planning and organising skills to manage own tasks within required timeframes
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities
  - manage stress
  - work in a team environment
- time-management skills to work effectively in times of peak or fluctuating demand.

Required knowledge

- industry-specific terminology
- legislative and regulatory requirements relevant to the deployment of customer service field staff
- operational environment, including customer base, company products and services
- organisational policy, procedures, culture, values, mission, business goals and standards relevant to deploying customer service field staff
- work deployment systems.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of	

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assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • communicate with customers, staff and management • demonstrate knowledge of business protocols and requirements, including legislative and regulatory requirements relating to deploying customer service field staff • use systems to enter, maintain and control job details.
Context of and specific resources for assessment	Assessment must ensure access to: • workplace information and data • real or simulated workplace to discuss customer experience • performance management and quality assurance documentation • relevant legislation and regulatory codes.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • direct observation during actual calls and follow-up • internal and external customer feedback • review of quality assurance feedback • review of data entry and error reports • oral and/or written questioning to assess knowledge of business protocols and requirements, including regulatory and legislative requirements • analysis of implementation of continuous improvement strategies • review of actual performance against targets.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO301B Use multiple information systems • BSBCUS301B Deliver and monitor a service to customers.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Job may include:	• customer visits to provide services or to assess for service provision or sales • installation, maintenance and repair of products or services on customer site • work duties requiring travel to another site.
Resources may include:	• personnel, including field operatives • products • tools and equipment • transport.
Manual despatch may include:	• email • facsimile • message service • telephone call.
Job details may include:	• details required to identify and specify the work to be undertaken • estimated work time and work required • name and address of customer or work site • payment details • special instructions.
Communication may include:	• email • facsimile • telephone • transmission of work or job request electronically.
Business protocols may include:	• approved business requirements for the use of communications and work requests • guidelines for completion of the necessary information in line with organisational policies, procedures and standards, and legislative and regulatory requirements.

Unit Sector(s)

Stakeholder relations – contact centre operations

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Custom Content Section

Not applicable.

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BSBCCO303B Conduct a telemarketing campaign

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCCO303A Conduct a telemarketing campaign .

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to undertake a telemarketing campaign, which may involve both inbound and outbound calling.

Competence in this unit requires preparing, conducting and reviewing the performance of a telemarketing campaign, including managing negative or difficult contacts and completing the sales process.

Application of the Unit

This unit applies in customer contact environments with a focus on sales, using varying levels of technology.

This work is undertaken with some supervision and guidance.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Prepare for telemarketing campaign	1.1 Study and clarify campaign details with team members, and prepare ***contact guides*** for ***telemarketing campaign***
	1.2 Learn the features of the ***product or service*** to be marketed
	1.3 Discuss ***operational boundaries*** and targets with relevant personnel
	1.4 Develop proficiency in the use of relevant ***technology***
	1.5 Develop strategies to achieve ***sales targets***
	1.6 Identify and develop a clear understanding of fulfilment processes
	1.7 Ensure campaign and contact guides meet ***relevant legislation, codes, regulations and standards***
2. Conduct planned telemarketing activity	2.1 Make customer contact in the most efficient manner possible
	2.2 Conduct contact according to contact guide, and enterprise policies and procedures
	2.3 Answer customer queries with professional responses, using active listening techniques
	2.4 Explain features and benefits of products or services to customers, where appropriate
	2.5 Improvise on contact guide content to suit customer needs
	2.6 Identify positive sales responses from customers and develop them into sales opportunities
	2.7 Close sales efficiently
	2.8 Escalate customer queries that cannot be satisfied, according to enterprise policy
3. Manage negative	3.1 Counter ***negative customer responses*** to the product, service

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customer responses	or organisation with positive features and benefits 3.2 Respond politely to personal or irrelevant negative customer responses 3.3 Identify limits of the organisation's tolerance to negatively responding customers and end negative customer contact accordingly 3.4 Escalate negative customer responses appropriately 3.5 Develop strategies to recover from negative customer responses and remain positive for next contacts
4. Complete sales	4.1 Record details of sale according to procedures 4.2 Discuss and agree ***payment arrangements*** with customer and action according to organisational policy 4.3 Advise customer of payment procedures 4.4 Record and verify ***credit card details*** with customer where appropriate and according to organisational protocols 4.5 Discuss and agree delivery arrangements with customer and record and action, where applicable 4.6 Activate the fulfilment processes necessary to complete the sale 4.7 Apply privacy requirements during the transaction
5. Record campaign results	5.1 Collate and present contact records according to organisational policy 5.2 Record and report difficulties not escalated 5.3 Analyse performance against agreed targets to identify future improvements 5.4 Amend errors and omissions in ***databases***

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- customer service skills to deliver professional customer service and sales support
- interpersonal skills to establish rapport and build relationships with customers
- literacy skills to communicate and articulate information and advice effectively
- numeracy skills to analyse, calculate and validate data

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- problem-solving skills to undertake credit risk evaluations that meet organisational credit policy requirements
- sales skills to maximise every contact and sales result
- self-management skills to:
  - conduct activity in a positive and result-focused manner
  - comply with policies and procedures
  - manage stress
  - remain calm when under pressure
  - seek learning and development opportunities
  - work in a team environment.

Required knowledge

- legislative and regulatory codes and requirements relating to conducting a telemarketing campaign
- marketing principles and practice
- operational environment:
  - customer base
  - company products and services
- organisational policies and protocols associated with customer service and sales
- sales techniques
- fulfilment processes
- technology and systems employed.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • meet agreed contact and sales ratios • achieve sales targets • apply pre-prepared contact guide • manage negative customer contact without disrupting operations • record sales, payments and delivery arrangements • successfully handle difficulties incurred during campaign • demonstrate knowledge of legislative and regulatory codes

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	and requirements.
Context of and specific resources for assessment	Assessment must ensure access to: • workplace information and data, including call/contact guides • performance management, sales performance and quality assurance documentation and records • relevant legislation, regulatory requirements, organisational standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of performance and sales results • direct observation during sales process, including negative customer contacts • oral and/or written questioning to assess knowledge of sales techniques, and legislative and regulatory requirements • review of quality assurance records • audit of customer and sales records.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO304C Provide sales solutions to customers • BSBCUS301B Deliver and monitor a service to customers.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Contact guides may include:	• contact-closing techniques • contact flow • escalating policy • features and benefits of product or service • greeting etiquette • pricing

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	• regulatory, legislative and organisational requirements.
Telemarketing campaigns may include:	• customer retention activities, such as re-contracting, loyalty and incentive programs and offering value-added services • fundraising • product sales • service sales • up selling and cross selling.
Product or services may include:	• goods • ideas • infrastructure • private and public sets of benefits.
Operational boundaries may include:	• discretion to deviate from the call/contact guide • guidelines and parameters within which the telemarketer can operate • limits of contact with the customer • mandatory and voluntary requirements • relevant regulatory, legislative and organisational requirements.
Technology may be modified for use by people with a disability and include:	• information systems • sales tracking technology • telecommunications systems.
Sales targets may include:	• call volumes • conversion rates • sales made • retention rates.
Relevant legislation, codes, regulations and standards may include:	• Consumer Credit Code • Do Not Call Register • equal employment opportunity and anti-discrimination legislation • freedom of information • industry-specific codes, regulations and legislation • occupational health and safety legislation • Privacy Act • Trade Practices Act/Competition and Consumer Act
Negative customer responses may include:	• criticising the product or organisation • crude or offensive language • declining further contact • personal insults or threats.
Payment arrangements may include:	• cash • cheque

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	• credit card • EFTPOS • money order • payment on delivery.
Credit card details may include:	• cardholder details • card number • card expiry date.
Databases may include:	• business directories • organisational records • sales records • telephone directories.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO304C Provide sales solutions to customers

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Escalation of contact incorporated in range statement. Replaces BSBCCO304B Provide sales solutions to customers.

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to process sales enquiries requiring complex solutions and to follow up to ensure customer satisfaction.

Competence in this unit requires effective customer service and sales skills, and the provision of the required levels of sales support for customers. It may involve performing credit checks and using systems and technology at varying levels.

Application of the Unit

This unit applies in inbound and outbound customer contact environments where sales are an element of the role.

The work is undertaken with some supervision and guidance.

Sales may include up-sell or cross-sell activities, as well as new sales or retention activities, such as re-contracting or applying loyalty programs.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Identify customer needs	1.1 Question customers in detail and listen actively to determine product and service requirements 1.2 Verify and agree customer needs with the customer 1.3 Access existing customer records and offer technical and specialist advice to customer, where such advice is considered beneficial to the closing of the sale and customer understanding and decision making 1.4 Identify customer's financial limitations 1.5 Discuss estimates and quotes with team and specialist staff if necessary, prior to submission to customer
2. Respond to customer needs	2.1 Prepare, present and discuss estimates and quotes with customer, as the role permits 2.2 Explain fully benefits of the various options and pricing structures to the customer 2.3 Give customer the opportunity to question options and quotes provided 2.4 Promote advantages of dealing with the organisation 2.5 Manage customer objections effectively by promoting specific benefits
3. Close sales	3.1 Agree on product or service to be purchased with the customer 3.2 Establish customer's preferred purchase and payment arrangements 3.3 Finalise documentation relating to sale and forward to customer

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	for agreement and signature 3.4 Negotiate and arrange payment method with customer 3.5 Conduct appropriate credit checks 3.6 Clearly record delivery/installation arrangements as agreed with customer 3.7 Comply with relevant legislation, codes, regulations and standards during the contact and sale
4. Input sales records	4.1 Fully record details of sale 4.2 Amend existing customer records where appropriate 4.3 Initiate invoices according to organisational policy 4.4 Organise delivery/installation according to organisational policy
5. Provide sales support where required	5.1 Verify customer satisfaction after delivery/installation 5.2 Identify additional action to satisfy customer needs 5.3 Initiate action in an efficient and timely manner

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to communicate with internal and external customers
- customer service and sales skills to operate within sales environment
- literacy skills to clearly articulate information and advice
- negotiation skills to work with difficult contacts or situations
- numeracy skills to accurately analyse and validate data
- planning and organising skills to manage own tasks within required timeframes
- problem-solving skills to apply a range of problem-solving strategies
- self-management skills to:
  - comply with policies and procedures
  - evaluate and monitor own performance
  - have confidence in own ideas
  - seek learning and development opportunities
  - work in a team environment.

Required knowledge

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- estimate and quote procedures
- marketing and sales principles and practices
- organisational pricing policies
- organisational protocols associated with customer service and sales
- statutory, regulatory and legislative requirements relating to providing sales solutions to customers.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • match product or service to customer need • clearly explain prices relating to product or service offered • apply appropriate credit checks • arrange customer payments • reach agreement with customers as to payment and delivery arrangements • record sales, payments and delivery arrangements.
Context of and specific resources for assessment	Assessment must ensure access to: • relevant standards, guidelines and legislation • workplace information and data • relevant resources • work environment or simulated customer contact centre to observe interaction with customers.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • direct observation of interaction with customers • review of record of sale and customer satisfaction • review of agreed payment methods and credit checks • oral and/or written questioning to assess knowledge of security and operational systems and organisational requirements.

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Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO301B Use multiple information systems • BSBCUS301B Deliver and monitor a service to customers.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Product and service requirements may include:	• different products or services that meet customer needs, which may include:
	  • pricing differentials
	  • product models
	  • product or service mixes
	  • product or service types.

Technical and specialist advice may include:	• discussion with:
	  • product or service specialists
	  • product or service providers
	  • marketing staff
	• escalation of contact to:
	  • product or service specialists
	  • product or service providers
	  • marketing staff.

Sale may include:	• amendments to previous sale arrangements • product or service • purchase provision • variation to existing product or service • upgrade of current product or service.
Purchase and payment arrangements may include:	• cash • cheque • credit card • direct debit • money order • payment on delivery.

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Credit checks may be:	• automated • undertaken by sales person or by specialist staff within the organisation.
Relevant legislation, codes, regulations and standards may include:	• Consumer Credit Code • equal employment opportunity and anti-discrimination legislation • Privacy Act • Telecommunications Act • Trade Practices Act/Competition and Consumer Act

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO305B Process credit applications

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. BSBCCO305A Process credit applications

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to handle credit applications or arrangements for customers with no credit rating or a poor credit rating and as required by an organisation.

Competence in this unit requires sound credit assessment outcomes, arrangement of effective debt-recovery initiatives or programs, and negotiation of various outcomes with customers.

Application of the Unit

This unit applies in customer contact environments where assessing credit risk and recovering debts are either core functions or elements of broader customer service and sales delivery.

This work is undertaken with some supervision and guidance.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Review and evaluate credit application	1.1 Review application to determine customer details and amount of credit required 1.2 Check existing customer records for payment history and credit standing 1.3 Obtain customer credit rating according to credit management procedures 1.4 Establish customer's credit rating and ability to repay credit advances
2. Process credit application	2.1 Approve or decline application according to organisational policy and relevant legislation, codes, regulations and standards 2.2 If declining, explain the decision to the customer and discuss alternative arrangements as necessary 2.3 Advise customer of appeal rights where appeal provisions exist and apply
3. Negotiate credit application details with customer	3.1 Negotiate and agree payment arrangements with customer where credit approval is granted 3.2 Escalate difficulties experienced in customer negotiations according to organisational policy
4. Complete administrative arrangements	4.1 Complete and forward appropriate documentation to customer 4.2 Organise credit arrangements and record details according to organisational policy and legislative requirements 4.3 Notify customer of payment arrangements according to organisational procedures 4.4 Regularly monitor and follow up customer commitments 4.5 Resolve outstanding issues relating to credit application in an efficient and timely manner

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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to:
  - effectively and clearly communicate with customers at all levels
  - listen and ask questions to understand and clarify the needs of internal and external customers
- conflict resolution skills to effectively and calmly manage and resolve conflict situations
- literacy skills to clearly articulate information and advice via all contact media
- numeracy skills, including:
  - budgeting
  - financial management to solve credit issues and problems
- problem-solving skills to apply a range of problem-solving strategies
- self-management skills to:
  - comply with policies and procedures
  - manage personal stress during difficult customer contact
  - seek learning and development opportunities.

Required knowledge

- conflict resolution and negotiation techniques to facilitate effective customer service resolution
- credit and debt-recovery principles and techniques
- financial delegations and limits applied within organisation and specific to role
- legislative, regulatory and industry code requirements in relation to credit approval processes
- organisational credit management policies and procedures
- stress-management techniques to avoid burnout and personal pressure.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	

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Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • apply organisational credit procedures • determine customer capacity to pay • discuss and explain non-approval to customers • negotiate credit terms and payment arrangements with customers • demonstrate knowledge of legislative, regulatory and industry code requirements.
Context of and specific resources for assessment	Assessment must ensure access to: • organisational credit policies and standard operating procedures • workplace information and data • relevant information on legislation, regulations, codes of practice, hardship programs and standards.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • oral and/or written questioning to assess knowledge of credit policies and procedures • review of calculations of capacity to pay and payment arrangements • review of quality assurance and performance management records • review of notes on accounts • review of customer's adherence to payment arrangements or arrears history • direct observation during credit application contact.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCUS301B Deliver and monitor a service to customers • BSBWOR201A Manage personal stress in the workplace.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Credit management procedures may include:	• call-handling processes • escalation process • financial delegation and authorisation limits • hardship policies • internally developed guidelines • referral to specialist groups.
Relevant legislation, codes, regulations and standards may include:	• credit and finance Acts and codes • Consumer Credit Code • Do Not Call Register • equal employment opportunity and anti-discrimination legislation • freedom of information • hardship policies • industry-specific codes, regulations and legislation • occupational health and safety legislation • Privacy Act • Trade Practices Act/Competition and Consumer Act
Payment arrangements may include:	• agreed instalments • cash • cheque • credit card • direct debit • EFTPOS • electronic payment, e.g. BPAY.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO306B Process complex accounts

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCCO306A Process complex accounts

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to handle difficult contacts relating to customer billing and customer accounting, primarily where the customer is defaulting.

Competence in this unit requires excellent customer service skills and acceptable overall outcomes for the business and the customer.

Application of the Unit

This unit applies in customer contact environments where the contact involves dealing with defaulting customers facing severance of services or challenges relating to payment of bills.

This work is undertaken under supervision and guidance.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Receive and review a customer default enquiry or case	1.1 ***Receive*** and review customer enquiry to identify details of case 1.2 Obtain additional information to assist in resolving case 1.3 Review options to resolve case with other staff members, where appropriate 1.4 Obtain specialist and team member advice, and escalate where necessary 1.5 Consider eligibility for ***hardship program*** 1.6 Observe ***relevant legislation, codes, regulations and standards*** 1.7 Develop initial advice to be given to customer
2. Negotiate payment with defaulting customers	2.1 Consult with customer on the suggested course of action and options 2.2 Assess customer response to the consultation 2.3 Develop realistic settlement options giving consideration to policy, customer response and payment history 2.4 Offer and agree on a ***payment option*** with the customer according to organisational policy 2.5 Record revised payment options as agreed with customer and according to organisational procedures
3. Advise defaulting customers of cancellation	3.1 Advise defaulting customers of ***service or product cancellation*** 3.2 Negotiate successful product return with customer where appropriate 3.3 Explain debt-recovery process to customer

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	3.4 Initiate debt-recovery process
4. Manage default actions	4.1 Follow up payment, debt recovery or product return to ensure completion of case 4.2 Amend customer records according to organisational procedures 4.3 Follow organisational default and ***credit-management procedures***

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - articulate information and advice across all media
  - deal effectively with internal and external customers in a range of situations
  - use active listening and questioning to pick up and explore subtle comments or tones that may help understand or resolve the issue
- customer service skills to negotiate mutually acceptable outcomes with defaulting customers
- negotiation skills to get a positive result to a difficult situation or contact
- numeracy skills to analyse, understand and manipulate data as required during contact
- problem-solving skills to resolve problems in the most effective and efficient manner
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities
  - work in a team environment.

Required knowledge

- conflict resolution and negotiation techniques to facilitate effective resolution of customer service issues
- customer service protocols
- escalation processes
- legislative, regulatory and industry code requirements relating to account requirements
- organisational billing and credit procedures
- organisational financial delegations and authorisation limits
- product and service charges
- risk assessment and management principles

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- stress-management techniques to avoid burnout and personal pressure.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • develop options for meeting customer default enquiry • appropriately escalate contact issues • successfully negotiate with customer, including payment arrangements • implement an appropriate and timely debt-recovery process • demonstrate knowledge of legislative, regulatory and industry code requirements.
Context of and specific resources for assessment	Assessment must ensure access to: • workplace information, reporting and data • information on relevant legislation, regulations, codes of practice and standards • information on organisational policies and standard operating procedures • financial delegations and authorisation limits.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • oral and/or written questioning to assess knowledge of organisational procedures, and legislative and regulatory requirements, including hardship programs, escalation process, and financial delegations and authorisation limits • review of internal and external customer feedback • direct observation during contact • review of documentation, including related work requests • review of quality assurance and performance management feedback.
Guidance information	Holistic assessment with other units relevant to the industry

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for assessment	sector, workplace and job role is recommended, for example: • BSBCCO301B Use multiple information systems • BSBCUS301B Deliver and monitor a service to customers.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Receiving customer enquiry may include:	• direct contact with customer • escalated enquiry • referred contact with customer • written enquiry by letter, email or facsimile.
Hardship programs may include:	• agreed position to avoid severance of service • extended payment arrangements • financial and budgeting counselling or advice • reduced payment arrangements • referral to financial counsellors.
Relevant legislation, codes, regulations and standards may include:	• credit and finance Acts • Consumer Credit Code • equal employment opportunity and anti-discrimination legislation • freedom of information • industry-specific codes, regulations and legislation • occupational health and safety legislation • Privacy Act • Trade Practices Act/Competition and Consumer Act
Payment options may include:	• consideration of future payments due • extended payment due date • postponed payment • reasonable payment up front and extended terms • reduced payments over extended term.
Service or product cancellation may include:	• recall of product or equipment • termination of service, such as electricity or mobile phone service.

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Credit-management procedures may include:	• call-handling processes • escalation processes • financial delegation and authorisation limits • hardship policies • internally developed guidelines • referral to specialist groups.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO307A Work effectively in customer contact

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to conduct customer contact operations. It requires an understanding of organisational requirements, expectations, policies and procedures.

Application of the Unit

This unit applies to activity in a customer contact environment.

This work is undertaken with some supervision and guidance.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

Not applicable.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of*

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Element	Performance Criteria
	performance is to be consistent with the evidence guide.

Elements and Performance Criteria

1. Identify requirements of the customer contact role	1.1 Identify ***specific customer contact operations*** and relate these to the industry-wide context 1.2 Identify the role of customer contact in relation to the organisation 1.3 Identify personal customer contact role and operations 1.4 Relate personal operations to organisation's customer contact objectives 1.5 Identify the major components of the ***customer contact infrastructure*** 1.6 Relate personal operations to customer contact infrastructure
2. Manage personal performance	2.1 Use available resources, ***systems*** and support effectively 2.2 Identify ***key performance indicators*** (KPIs) and comply with ***organisational processes*** and reporting protocols, policies and procedures 2.3 Comply with ***organisational, regulatory and legislative requirements*** 2.4 Identify personal ***performance requirements*** and expectations and adopt strategies to achieve them 2.5 Identify and participate in performance management and development processes
3. Maintain a professional approach to employment	3.1 Display a positive and ethical approach to employment and role 3.2 Identify realistic short- and long-term career objectives 3.3 Relate personal capabilities to current role and career objectives 3.4 Identify strategies for projecting a ***professional image*** in current role 3.5 Contribute to the promotion of the organisation and its staff to customers
4. Participate in a workplace team	4.1 Identify team member roles and team structure and interact cooperatively with team members

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	4.2 Recognise, acknowledge and contribute to the formation and achievement of team objectives 4.3 Recognise and respond positively to conflict within team 4.4 Provide feedback to enhance team performance

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to articulate effectively in the work environment
- goal setting and planning skills to achieve performance targets
- interpersonal skills to establish rapport and build relationships with clients, team members and stakeholders
- planning and organising skills to manage own tasks within required timeframes
- problem-solving skills to show independence and initiative in identifying and effectively solving conflict and problems
- self-management skills to:
  - comply with policies and procedures
  - proactively strive and self-evaluate for high standards of performance and behaviour
  - seek learning and development opportunities
- teamwork skills to contribute positively to the team.

Required knowledge

- customer base, company products and services
- discipline required in a customer contact environment, including:
  - adherence to schedule and rostering requirements
  - performance management
- industry-specific regulatory and legislative requirements in relation to customer service
- occupational health and safety (OHS) policies and guidelines
- operational systems used within scope of role
- organisational mission, business goals and standards
- organisational policies, procedures and guidelines in relation to customer service requirements
- scope of customer contact operations
- specific work role and key relationships.

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Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • demonstrate professional performance, compliance and adherence to KPIs in contact centre role • demonstrate effective teamwork • demonstrate knowledge of industry-specific regulatory and legislative requirements and how they apply to work performance.
Context of and specific resources for assessment	Assessment must ensure access to: • relevant information, such as organisational policies, standard operating procedures, performance management guidelines, role position descriptions, and organisational charts • peer and line manager feedback • contact centre environment to observe performance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • direct observation of the candidate working effectively within contact centre environment • oral and/or written questioning to assess knowledge of centre operations and own role • oral and/or written questioning to assess knowledge of regulatory and legislative requirements • review of quality assurance and training records • review of performance management and development documentation • review of peer and line manager feedback.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBWOR201A Manage personal stress in the workplace.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Specific customer contact operations may include:	• customer support • data collection • information services • marketing • sales • service provision • combinations of the above.
Customer contact infrastructure may include:	• automatic call distribution system • contact management systems • information technology networks and software systems • interactive voice recognition systems • internet and intranet services • other centre-specific systems • service level and call data reporting systems • security systems • telephony equipment.
Systems may include:	• automated call distribution (ACD) • customer relationship management (CRM) • complaint management database • information database • knowledge management applications • schedules • voice over IP applications.
Key performance indicators may include:	• those on customer satisfaction • those on customer effort • monitoring time taken to answer calls • operating within reporting protocols • score tools, such as net promoter • understanding metrics.
Organisational	• attending to forecasted calls

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processes may include:	• working in a team.
Organisational, regulatory and legislative requirements may include:	• code of conduct • Do Not Call Register • industry-specific regulatory codes and guidelines • OHS • quality management and assurance • Privacy Act • Trade Practices Act/Competition and Consumer Act.
Performance requirements may include:	• adherence to schedule • call rates • conversion rates • customer satisfaction • data entry quality requirements • first contact resolution • quality targets • sales targets.
Professional image may include:	• appearance and dress standards • commitment to customer service • commitment to team and centre goals • manner of communications • positive attitude.

Unit Sector(s)

Stakeholder relations – customer service

Custom Content Section

Not applicable.

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BSBCCO308A Conduct outbound customer contact

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to make outbound contacts in relation to enquiries or sales of particular products and services.

Competence in this unit requires initiating a wide range of customer contacts over a variety of communication methods. Compliance with organisational, legislative and regulatory requirements is required, as is the ability to respond in a manner that meets both customer and business needs.

Application of the Unit

This unit applies in outbound customer contact environments where a variety of communication channels and technologies are used.

This work is undertaken with some supervision and guidance.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria

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Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Prepare for outbound contact	1.1 Identify contact details and apply a clear understanding of ***organisational policies and procedures***
	1.2 Obtain and study ***product and service*** details relating to customer contact
	1.3 Study prepared ***contact guides or scripts***
	1.4 Locate ***sources of information*** that may be required to develop product or service expertise, or discuss requirements with team
	1.5 Develop proficiency with ***equipment and systems*** to effectively and efficiently manage contact
	1.6 Clarify details as required with relevant manager
2. Conduct outbound contact	2.1 Greet customer according to organisational protocol and in a manner that encompasses cultural diversity
	2.2 Use the contact guide efficiently to conduct the contact
	2.3 Answer enquiries and negotiate with customers according to policy
	2.4 Escalate enquiries that cannot be satisfied immediately
	2.5 Conduct ***contact closure*** according to policy
3. Arrange provision of a product or service	3.1 ***Respond appropriately*** to customer requirements and identify relevant options
	3.2 Select appropriate product or service in consultation with customer
	3.3 Agree actions or orders with customer, giving consideration to maximising value and service delivery to customer
	3.4 Consider ***customer retention options*** that can be applied to the contact
	3.5 Use clear, simple and easy to understand language and ensure

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	responses are comprehensive
4. Manage customer contact	4.1 Record details of contact according to policy 4.2 Record and report difficulties not escalated that may present an opportunity for continuous improvement 4.3 Adapt to the requirements and expectations of various customers when working in an ***outsource environment*** and dealing with multiple customer bases 4.4 Escalate enquiries or orders that cannot be satisfied immediately 4.5 Supply follow-up information to customer as required and in a timely manner 4.6 Observe ***relevant legislation, codes, regulations and standards*** throughout transaction

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- customer service skills to deliver required level and quality of customer service
- communication skills to:
  - articulate effectively over the required channels
  - relate to people from diverse backgrounds and with diverse abilities
  - use listening and questioning to understand and clarify the needs of customers
- interpersonal skills to:
  - establish rapport and build relationships with customers
  - handle difficult customers
- negotiation skills to persuade customers and elicit buy-in on the sale of product or service
- numeracy skills to analyse, calculate and validate data
- planning and organising skills to manage own tasks within required timeframes
- self-management skills to:
  - comply with policies and procedures
  - handle peak periods of activity in a positive and enthusiastic manner
  - manage stress
  - seek learning and development opportunities
  - work in a team environment.

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Required knowledge

- operational environment, including:
  - company products and services
  - customer base
- organisational communication channels
- organisational performance and customer service expectations
- organisational policies, procedures, protocols and guidelines, including financial delegation policy
- principles of customer service
- principles of sales and negotiation
- stress and time-management techniques
- technology and systems.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • record data • demonstrate knowledge of enterprise products and services and compliance requirements • meet agreed standards of contact • achieve performance targets • use technology, which may be modified for use by people with a disability.
Context of and specific resources for assessment	Assessment must ensure access to: • IT equipment • workplace information and data • performance management records and data • quality assurance guidelines and call/contact guides.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate

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	• direct observation during contact, which may be done by double jacking on telephone system • review of documentation of performance against targets • review of quality assurance feedback • review of accuracy of data and record entry • oral and/or written questioning to assess knowledge of the enterprise, legislative and regulatory requirements, and products and services • observation of practical demonstration of sourcing required information.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO301B Use multiple information systems • BSBCUS301B Deliver and monitor a service to customers.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Organisational policies and procedures may include:	• adherence to scheduling • scope of the services to be provided • financial and decision-making delegations • referral and escalation paths.
Products and services may include:	• goods • ideas • infrastructure • private and public sets of benefits.
Customer contact may include:	• email and other electronic communications • face-to-face • facsimile • internal, external and outsourced customers • letter • telephone.
Contact guides or scripts may relate to:	• contact-closing technique • contact flow

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	• features and benefits of product or service • greeting etiquette • pricing • regulatory, legislative and organisational requirements.
Sources of information may include:	• brochures and pamphlets • campaign briefs • internet and intranet • instruction or product manuals.
Equipment and systems may include:	• computer and telecommunications equipment, which may be modified for use by people with a disability • information management systems • workflow management systems.
Contact closure may include:	• a shortened sales cycle • overcoming objections • asking defining questions • maximising opportunities • managing complex negotiations • increasing productivity and time management • moving to transaction discussion once interest has been elicited.
Responding appropriately may include:	• recording details in enterprise systems • discussing, agreeing and recording supply arrangements with customers • discussing and agreeing on payment options with customers • conducting credit checks.
Customer retention options may include:	• loyalty programs or incentives • offering value-added services or products • re-contracting • special offers as determined by the organisation from time to time.
Outsource environment may include:	• customer contact environment servicing customers of another enterprise or business unit by agreement • customer contact environment taking contacts for multiple enterprises • customer contact environment taking overflow calls for another enterprise.
Relevant legislation, codes, regulations and standards may include:	• Consumer Credit Code • Do Not Call Register • equal employment opportunity and anti-discrimination legislation • freedom of information • industry-specific codes, regulations and legislation

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	• occupational health and safety legislation • Privacy Act • Trade Practices Act/Competition and Consumer Act

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO309A Develop product and service knowledge for customer contact operation

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to develop knowledge of products and services in preparation for customer contact in an inbound or outbound customer contact activity.

Knowledge of products and services may be used for customer liaison, presenting information or for the sales process.

Application of the Unit

This unit applies to individuals in a small, medium or large enterprise across a wide variety of industries and contexts who develop their product and service knowledge prior to undertaking customer contact activities.

This work is undertaken with some supervision and guidance.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Acquire knowledge of products and services in a specified area	1.1 Identify ***information sources*** about ***products and services*** in a specified area and evaluate them for reliability and validity 1.2 Identify purpose and use of product and service 1.3 Identify and evaluate key ***features*** of the products and services 1.4 Identify and evaluate strengths and weaknesses of the products and services 1.5 List relevant product and service support details
2. Evaluate the full range of products and services in a designated area of business	2.1 Use a range of information sources to identify the range of products and services in a designated area of business 2.2 Compare features, benefits, strengths and weaknesses of the range of products and services available 2.3 Establish relative standing of the organisation's products and services with the alternatives to communicate differences to the buyer or user
3. Convert product and service knowledge into benefits	3.1 Identify features of the products and services that have potential buyer or user appeal 3.2 Present relevant features of the products and services as benefits to the stakeholder 3.3 Present benefits of the products and services within the context of ***organisational requirements*** and legislation

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

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Required skills

- information management skills to summarise information verbally and in writing
- literacy and numeracy skills to:
  - interpret product and service features and sales data
  - summarise information obtained from a variety of sources, including verbal, written and visual
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities
  - work in a team environment.

Required knowledge

- features, benefits, strengths and weaknesses of the range of products and services available within a designated business
- industry alternatives, trends and developments as they apply to products and services
- organisational structure, roles and responsibilities, policies, procedures, product labelling and descriptions
- potential user or buyer markets
- processes used when describing products and services
- key provisions of relevant legislation that affect business operations, such as:
  - anti-discrimination
  - consumer protection
  - contract law legislation
- ethical principles relating to:
  - privacy laws
  - Trade Practices Act/Competition and Consumer Act.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the ability to: • identify key features and benefits of products and services within area of business

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competency in this unit	• demonstrate knowledge of organisational products and services.
Context of and specific resources for assessment	Assessment must ensure access to: • workplace information and data • information sources about an organisation's products, services or ideas • office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of presentation of key features and benefits to customers in a real or simulated context • oral or written questioning to assess knowledge of features, benefits, strengths and weaknesses of organisation's and alternative products and/or services • review of evaluation of information sources about products in a specified area • evaluation of strengths and weaknesses established for competitors' products.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Information sources may include:	• associations • catalogues • claims of competitive sales people • competitor websites • competitor sales literature • external sales data sources, such as warehouse withdrawals

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	• internal sales data records • other company personnel • sales conventions • team members • trade association magazines • trade shows.
Products and services may include:	• goods • ideas • infrastructure • private and public sets of benefits.
Features may include:	• brand • colour • country of origin • covenant • manufacturer • product care details • safety aspects • shelf life • size • style • warnings.
Organisational requirements may include:	• level of client service required • policies and procedures, which are formally documented and available for reference in the workplace.

Unit Sector(s)

Stakeholder relations – customer service

Custom Content Section

Not applicable.

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BSBCCO403A Schedule customer contact activity

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to schedule customer contact activity. It requires the skills and knowledge to manage customer contact schedules using manual and electronic systems.

Application of the Unit

This unit applies to any customer contact environment.

This work can be undertaken by specialist staff, administration organisers, operational team leaders or those with supervisory responsibility, depending on the size and structure of the contact centre.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised*

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Element	Performance Criteria
unit of competency.	*text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Analyse contact traffic data	1.1 Access ***contact traffic data***
	1.2 Identify contact traffic patterns over short and long ***intervals***
	1.3 Identify anomalies and non-recurring events in contact patterns
2. Review forecasting and planning	2.1 Incorporate the identified range of ***contact centre or customer contact phenomena*** into resource planning
	2.2 Incorporate the issues arising from the impact of customer contact phenomena when forecasting and planning
3. Plan labour requirements	3.1 Determine basic inputs to ***queuing tools***
	3.2 Calculate resources required using queuing tools
	3.3 Adjust results to account for ***quantitative and qualitative factors***
	3.4 ***Schedule*** levels of forecasted call and contact traffic
	3.5 Maximise operational efficiency and customer service levels in schedules while minimising wage costs
	3.6 Use the available skill base appropriate to schedule the most effective use of human resources
	3.7 Communicate schedules to staff within designated timelines

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - communicate with personnel at all levels
  - conduct effective formal and informal meetings

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  - express ideas and concepts
- supervisory skills to gain trust and confidence of colleagues and stakeholders
- numeracy skills to:
  - carry out basic arithmetical calculations
  - apply financial understanding to adhere to budgetary resources
- planning and organising skills to manage own tasks within required timeframes
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities
- technology skills to organise data and information.

Required knowledge

- budgeting principles
- contact traffic measurement systems
- operating environment requirements and objectives
- organisational communication methods
- queuing and forecasting tools
- techniques for scheduling call and contact traffic.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • prepare customer contact schedules • demonstrate knowledge and use of key features of contact traffic measurement systems.
Context of and specific resources for assessment	Assessment must ensure access to: • information and databases for analysis activities • standards and guidelines in relation to customer contact scheduling.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

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	• direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of call and contact traffic schedules for a range of timeframes, including consideration of contingencies and external factors • oral and/or written questioning to assess knowledge of the impact of customer contact phenomena on forecasting • review of stakeholder feedback on service.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO404A Gather, collate and record information • BSBCUS401B Coordinate implementation of customer service strategies.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Contact traffic data may include:	• data extracted from customer contact systems that can:
	  • detail statistics of numbers, types and times of contact
	  • be sorted and tabulated for individual agents and groups of agents
	• data on other types of contact, including:
	  • email
	  • face-to-face
	  • letters
	  • SMS (text messages)
	  • website.

Intervals may include:	• periods for reporting, which may be:
	  • annual
	  • daily
	  • half hourly
	  • hourly
	  • seasonal

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	• weekly.
Contact centre or customer contact phenomena may include:	• administration duties • billing and credit issues • climate, environmental and health factors • equipment failures • escalating contacts • excessive call lengths • excessive leave commitments • external influences or factors • marketing and competitor activity • media attention • training periods and team meetings.
Queuing tools may include:	• Erlang B and C tools • facilities within automated call distribution (ACD) systems that provide the capacity to sort and queue different types of calls according to pre-set business rules.
Quantitative and qualitative factors may include:	• contact cost considerations • marketing activity • seasonal variations • variations in staff availability • variations in staff experience and skills and knowledge.

Scheduling may include:	• business demands, goals and key performance indicators (KPIs)
	• forecasting enquiries, by using a forecasting model that uses weighted averages from previous scheduling periods, including:
	  • calls
	  • email
	  • escalations
	  • mail
	• employee preferences
	• heuristic, where call sequence is ordered by customer balance
	• legislation and regulations
	• operational constraints
	• scheduling methods, such as:
	  • batch optimised: hourly scheduling (16-hourly lists)
	  • dynamic optimised: hourly scheduling (re-optimised at the beginning of every hour)
	• work function projections, incorporating quality and quantity.

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Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO404A Collect, analyse and record information

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to gather, collate and record information from a variety of sources, including database systems.

Competence in this unit requires preparing, undertaking and recording relevant and required details of information collected according to organisational, legislative and regulatory requirements. It also requires efficient use of relevant technology.

Application of the Unit

This unit applies in environments where accurate and detailed records of contacts are a mandatory requirement of the role. This may or may not involve using interview recording technology.

This work is undertaken under supervision.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria

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Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Obtain, record and analyse information	1.1 Identify ***information sources***
	1.2 Collect and record ***information*** according to organisational procedures and legislative and policy requirements
	1.3 Collate and sort collected information in relation to the purpose for which it is being obtained
	1.4 Ensure contents of ***recording forms and reports*** used meet ***organisational processes***
2. Reduce, describe and review information	2.1 Identify information that is to be ***analysed*** and identify ***analysis methodology*** and ***analysis processes***
	2.2 Reduce and describe subject to support the development of interpretations
	2.3 Review the appropriateness of the ***reduced information*** according to organisational processes
	2.4 Archive information not used in the ***reduction and description processes*** for future reference
3. Develop inferences	3.1 Test interpretations to review credibility and consistency
	3.2 Refine and consolidate interpretations to strengthen inferences drawn
	3.3 Formulate inferences from facts and tested interpretations, incorporating chain of reasoning to ensure transparency to clients and users
	3.4 Inform clients and users about assumptions in the arguments leading to inferences
	3.5 Assess and report the relationship between information developed and probable interpretations, ensuring validity and compliance with organisational guidelines
	3.6 Develop sound recommendations that inform users of intelligence analysis outcomes

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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to analyse information and data
- communication skills to:
  - articulate information
  - provide advice and instructions
  - prepare and compile detailed statements and reports
  - use questioning and listening skills to understand and resolve issues raised
- numeracy skills to analyse, record and store data according to organisational requirements
- planning and organising skills to manage own tasks within required timeframes
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities.

Required knowledge

- information types and their sources
- procedures and security measures for accessing, storing, retrieving and sharing data from databases
- procedures for use of evidence and contact recording technology
- rights of individuals in relation to the conduct of interviews and statement compilation
- statutory, regulatory and legislative requirements relating to information collation.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the ability to: • collate information • record primary data used, including audiotapes and statement if relevant to role

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competency in this unit	• analyse, interpret and summarise information and make recommendations based on the outcomes of the analysis • demonstrate knowledge of statutory, regulatory and legislative requirements.
Context of and specific resources for assessment	Assessment must ensure access to: • information and databases for analysis activities • relevant legislation, standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of statements • review of compliance with statutory, regulatory, legislative and organisational requirements • oral and/or written questioning to assess knowledge of storage and disposal of information.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Information sources may include:	• colleagues • community groups • community leaders • crime, accident and incident scenes • customers • general public • individuals • information databases • local government • local media

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	• schools • specific target groups, in the case of opinion polls and surveys.
Information may include:	• addressing public order and general community issues • assisting in an investigation • details of an incident or medical emergency • locating a specific person • location of witnesses • opinion poll or customer survey • progressing and supporting court hearings and matters.
Recording forms and reports may include:	• handwritten and electronic pro formas and reporting styles • use of organisation's enterprise information system.
Organisational requirements may include:	• accurate • complete • concise • in the correct format • legible • understandable.
Analysis may include:	• causative or predictive • descriptive or explorative • quantitative and qualitative or both.
Analysis methodology may include:	• biographical analysis • comparative analysis • Delphi technique • demographics or geographical analysis • historical analysis • hypothesis development • link analysis • scenario generation.

Analysis processes may include:	• inductive:
	  • interpreting raw information
	  • identifying trends or patterns and testing them
	• deductive:
	  • beginning with a hypotheses and testing it
	  • lateral, critical or creative processes
	• using problem-solving techniques and decision making.

Reduced information may include:	• charts • diagrams • lists • summaries

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	• tables.
Reduction and description processes may include:	• testing of logical reasoning • consideration of balance • objectivity • critical evaluation of additional information collection.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO405A Survey stakeholders to gather and record information

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to survey stakeholders to gather and record information.

Competence in this unit requires preparing, undertaking and recording relevant and required details of information collected according to organisational, legislative and regulatory requirements. It also requires efficient use of relevant technology.

Application of the Unit

This unit applies in environments where accurate and detailed records of contacts are a mandatory requirement of the role. This involves using interview recording technology.

This work is undertaken under supervision.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Obtain, record and analyse information from the community	1.1 Identify ***information sources***
	1.2 Collect and record ***information*** according to organisational procedures and legislative and policy requirements
	1.3 Collate, sort and analyse information collected in relation to the purpose for which it is being obtained
	1.4 Ensure contents of ***recording forms and reports*** are in line with ***organisational requirements***
2. Take and compile statements	2.1 Take ***comprehensive statements*** from sources appropriate to the matter being investigated according to organisational procedures and legislative and policy requirements
	2.2 Use active listening when taking accurate statements from people
3. Conduct interviews	3.1 Plan, manage and conduct interviews to gather maximum amount of information relevant to the matter being examined
	3.2 Treat all interviewees fairly and equitably
	3.3 Conduct and record interviews according to legislation, policy and procedures
4. Use information and database systems	4.1 Enter information into database, adhering to data entry security procedures
	4.2 Identify and use appropriate sources of information when recording data
	4.3 Access and store information according to legislation, policy and procedures
5. Use interview and evidence recording equipment	5.1 Operate ***recording equipment*** according to legislation, policy and procedures
	5.2 Produce ***records*** according to organisational requirements and

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	procedures 5.3 Maintain equipment and usage logs in good order
6. Conduct follow-up activity with other members of the organisation	6.1 Identify and use communication links within the organisation to exchange information 6.2 Assess the relevance of information received in terms of its intended purpose 6.3 Dispose of irrelevant information according to legislation, policy and procedures

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to analyse information and data
- communication skills to:
  - articulate information, advice and instructions
  - question and listen in order to understand and resolve issues raised
- interpersonal skills to establish rapport and build relationships with stakeholders
- literacy skills to prepare and compile detailed statements and reports
- numeracy skills to analyse, record and store data according to organisational requirements
- planning and organising skills to manage own tasks within required timeframes
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities.

Required knowledge

- information types and their sources
- procedures and security measures for accessing, storing, retrieving and sharing data from databases
- rights of individuals in relation to the conduct of interviews and compilation of statements
- statutory, regulatory and legislative requirements relating to surveying stakeholders
- use of evidence and contact recording technology.

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Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • record interviews, including audiotapes and statements if relevant to role • demonstrate interview techniques • demonstrate knowledge of statutory, regulatory and legislative requirements relating to surveying processes.
Context of and specific resources for assessment	Assessment must ensure access to: • information and databases for analysis activities • relevant legislation, standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of statements or recording of details of contacts • review of compliance with statutory, regulatory, legislative and organisational requirements • oral and/or written questioning to assess knowledge of interviewing techniques and outcomes • oral and/or written questioning to assess knowledge of storage and disposal of information.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Information sources may include:	• colleagues • community groups • community leaders • crime, accident and incident scenes • customers • general public • individuals • information databases • local government • local media • schools • specific target groups – in the case of opinion polls and surveys.
Information may include:	• addressing public order and general community issues • assisting in an investigation • details of an incident or medical emergency • locating a specific person • location of witnesses • opinion poll or customer survey • progressing and supporting court hearings or matters.
Recording forms and reports may include:	• handwritten and electronic pro formas and reporting styles • use of organisation's enterprise information system.
Organisational requirements may include:	• accurate • complete • concise • in the correct format • legible • understandable.
Comprehensive statements may include:	• all details required by the organisation • all information required for the investigation or research task • records in a format that comply with the legal requirements for statements; where appropriate and legal, statements may also be recorded in forms other than written, such as audiotape

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	or audiovisual (video) tape.
Recording equipment may be modified for use by people with a disability and may include:	• audiotape recorders • authorisation, storage and filing of original and duplicates of tapes and film • basic fingerprinting equipment • video cameras and recording equipment.
Records must be:	• authorised, stored and assessed in line with organisational procedures • clear, audible and presentable.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO406A Run a multicentre

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to develop strategies to manage organisational systems to oversee a multicentre.

Running a multicentre may entail being responsible for staff involved in delivering customer service. The work will occur within the organisation's policies and procedures framework.

Application of the Unit

This unit applies in customer contact environments that administer product and service support or sales, or address information enquiries from consumers.

A multicentre may be operated through extensive open workspaces, with work stations that may include computers and a telephone set/headset connected to a telecom switch.

Multicentres can be independently operated or networked with additional centres and linked to a corporate computer network.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Plan the oversight of a multicentre	1.1 Assess the nature of the multicentre 1.2 Incorporate needs of customers in planning processes 1.3 Ensure plans achieve the quality, time and cost specifications agreed with customers
2. Monitor, adjust and review multicentre service	2.1 Use appropriate strategies to monitor progress in achieving product and service targets and standards 2.2 Use appropriate strategies to obtain customer feedback to improve the provision of products and services 2.3 Develop, procure and use resources to provide quality products and services to customers
3. Review service	3.1 Make decisions to overcome problems and to adapt customer service and product delivery in consultation with appropriate individuals and groups 3.2 Assist colleagues to overcome difficulty in meeting customer service standards and to escalate enquiries appropriately 3.3 Manage records, reports and recommendations within the organisation’s systems and processes

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication, coaching and mentoring skills to provide support to colleagues
- planning and organising skills to organise customer product and service delivery

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- problem-solving skills to deal with complex and non-routine difficulties and the variety of service details associated with multiple service facets
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities.

Required knowledge

- multicentre service requirements
- techniques for solving complaints, including the principles and techniques involved in the management and organisation of:
  - customer behaviour
  - customer needs research
  - customer relations
  - ongoing product and service quality
  - problem identification and resolution
- quality customer service delivery
- record keeping and management methods
- strategies for monitoring, managing and introducing ways to improve customer service relationships
- strategies to obtain customer feedback.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • deliver quality customer service, incorporating plans, policies and procedures • solve complex customer issues and multicentre system problems that lead to poor customer service • demonstrate knowledge of techniques for solving complaints.
Context of and specific resources for assessment	Assessment must ensure access to: • appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical

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	skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports • demonstration of service-delivery techniques • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of performance in role plays • evaluation of leadership, supervision, coaching and mentoring used to assist colleagues to overcome difficulty in meeting customer service standards • review of strategies developed and used to monitor progress in achieving product and service targets and standards • review of records, reports and recommendations about managing customer service.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Nature of the multicentre may include:	• independently operated or networked with additional centres • a corporate computer network, including mainframes, microcomputers and local area networks (LANs) • telephony • voice and data pathways linked through computer telephony integration (CTI).
Customers may be:	• board members • clients and purchasers of services • co-workers and fellow frontline managers • members of the general public who make contact with the organisation, such as prospective purchasers of services • potential funding bodies • supervisors • suppliers of goods and services and contractors providing

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	goods and services.
Quality may refer to:	• characteristics of a product, system, service or process that meet the requirements of customers and interested parties.
Strategies may refer to:	• databases and other controls to record and compare data over time • electronic feedback mechanisms using intranet, internet and email • feedback forms and other devices to enable communication from customers • long-term or short-term plans for monitoring achievement of key performance indicators and targets and evaluating their effectiveness • policies and procedures • questionnaires, survey and interviews • training and development activities.
Products and services may include:	• goods • ideas • infrastructure • private and public sets of benefits.
Resources may include:	• buildings and facilities • equipment • finance • information • people • power and energy • technology • time.

Unit Sector(s)

Stakeholder relations – customer service

Custom Content Section

Not applicable.

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BSBCCO407A Administer customer contact technology

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to manage, program, monitor and rectify problems with telecommunications technology.

Competence in this unit requires the ability to maintain, troubleshoot, modify and improve the functioning of multichannel equipment; liaise with internal or external information technology support areas as necessary; and report appropriately and accurately.

Application of the Unit

This unit applies to the administration of potentially complex customer contact multichannelled systems in a customer contact environment.

This work may be undertaken by a specialist, team leader or manager, depending on the size and structure of the centre.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria

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Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Reprogram multichannel system software	1.1 Confirm details of request for ***system changes*** with relevant stakeholders 1.2 Select appropriate ***reprogramming methods*** 1.3 Implement procedures for reprogramming ***multichannel*** systems 1.4 Check and confirm outcome of reprogramming against initial request 1.5 Initiate action to address reprogramming requirements
2. Produce system reports	2.1 Confirm purpose and details of ***report type*** 2.2 Generate system reports effectively and efficiently 2.3 Modify system reports, where necessary, to meet stakeholder requirements 2.4 Distribute reports to ***target audience*** in a timely manner 2.5 Clarify and explain report details to target audience as required
3. Manage multichannel system faults	3.1 Identify ***system faults*** and select best repair options 3.2 Escalate faults if necessary and in a timely manner 3.3 Implement ***fault repair*** and monitor repair progress closely 3.4 Select and implement ***contingency plans*** according to procedures

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

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Required skills

- communication skills to communicate effectively with personnel at all levels of the organisation
- literacy skills to prepare and edit reports and instructions dealing with complex technical issues and data
- negotiation skills to deal effectively with internal and external stakeholders
- networking and data-gathering skills to assist in managing and reporting on multichannel technology
- numeracy skills to carry out analysis and research
- planning and organising skills to manage own tasks within required timeframes
- problem-solving skills to understand and provide solutions for multichannel issues that arise
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities
- teamwork skills to work closely with and support stakeholders
- technology skills to:
  - use database applications, spreadsheets and Word
  - work effectively with complex multichannel technology.

Required knowledge

- business objectives and how technology supports them
- crisis management, disaster recovery and business continuity plans
- escalation paths and guidelines
- reporting requirements of the organisation
- service level agreement (SLA) or warranty and service agreement with vendors
- multichannel technology, including hardware and software.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the ability to: • reprogram system functions as required • generate quality and accurate system reports in a timely manner

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competency in this unit	• identify and distinguish between major and minor system faults • identify major fault contingency plans • demonstrate knowledge of crisis management, disaster recovery and business continuity plans.
Context of and specific resources for assessment	Assessment must ensure access to: • workplace information, data and reporting • service level guidelines and standards • appropriate computer and telecommunications resources, which may be modified for use by people with a disability • stakeholder feedback.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • direct observation of the candidate working on telecommunications equipment problems • oral and/or written questioning to assess knowledge of telecommunications equipment and requirements • review and assessment of reporting outputs • review of stakeholder feedback • review of process documentation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

System changes may include changes to:	• interactive voice response (IVR) • public access branch exchange (PABX) • queuing functions • reporting functions

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	• telephone configuration • user locations • visual displays.
Reprogramming methods may include:	• engagement of internal or external support • preparation of detailed instructions or requirements documentation • screen-driven commands and specifics as set out in manuals and delivered in equipment-specific training • testing methods to ensure effectiveness of reprogramming.

Multichannel may include:	• multichannel software:
	  • computer telephone
	  • outbound diallers
	  • unified automated call distribution (ACD), IVR, servers for email and web
	  • workforce management applications
	• SMS (text messages)
	• telephone
	• voice.

Report type and purpose may include:	• simple reports covering whole of centre work rates, to highly detailed reports covering many aspects of individual work rates • specific requirements of stakeholders or organisation • technology performance reporting for contract management.
Target audience for reports may include:	• colleagues • managers • stakeholders • team leaders • vendors for contract management.
System faults may include:	• disruptions in telecommunications • electrical faults • software problems • virus attacks • complete system failure • minor problems with individual telephones • minor problems with telecommunications technology.
Fault repair may include:	• engagement of external (vendor) parties to complete repair • immediate repair of minor faults by the system administrator • replacement of equipment or components of equipment.
Contingency plans may include:	• business continuity plan • crisis management plan • disaster recovery plan

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	• use of alternative equipment in the immediate area and/or redistributing work locally or moving operations to a back-up location.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO501B Develop business continuity strategy

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCCO501A Develop business continuity strategies

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to develop business continuity plans, processes and tools.

Business continuity is the stage between a crisis occurring and the implementation of a disaster recovery plan. It is aimed at keeping as many of the business critical operations operating as possible during this period.

Competence in this unit requires the development of a business continuity plan that will allow an organisation to continue operating, even if in a diminished capacity or only through business critical functions, until functionality is restored. It also requires analysis, planning, risk assessment and communication.

Application of the Unit

This unit applies to business continuity planning in small, medium and large organisations.

This role is undertaken by staff with managerial responsibility.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Evaluate the impact of the situation on business operations	1.1 Evaluate immediate impact of situation on business operations 1.2 Identify business functions that are potentially impacted 1.3 Determine likely timing before normal operations will be restored 1.4 Define and agree with stakeholders the parameters (timings) that will determine employment of disaster recovery procedures 1.5 Liaise and consult with affected parties and stakeholders
2. Identify business critical functions that must continue	2.1 Determine business imperatives that must be addressed or continue 2.2 Consider practical options to maintain business critical operations 2.3 Consult all major stakeholders and agree on priorities
3. Develop plan to maintain business critical operations	3.1 Determine available back-up facilities or systems 3.2 Map how business critical functions can be continued using a modified approach 3.3 Evaluate resourcing requirements 3.4 Consider occupational health and safety (OHS) requirements in formation of plan 3.5 Determine need for a communication plan to be developed and implemented and document plan as required

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	3.6 Communicate plan to stakeholders
4. Develop plan to update enterprise systems or information when systems become available	4.1 Evaluate the impact of modified operations on organisational information systems 4.2 Determine resources required to input manually collected data into systems and complete follow-up action 4.3 Work with stakeholders to consider downstream impacts 4.4 Develop communication plan to ensure all stakeholders are informed on status
5. Evaluate organisational performance reports	5.1 Evaluate effectiveness of business continuity activities 5.2 Seek stakeholder feedback 5.3 Determine areas for improvement 5.4 Modify business continuity plan documentation incorporating improvement areas

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - analyse relevant workplace information and data
  - develop and present reports or presentations that deal with complex ideas and concepts
  - incorporate observations of workplace tasks and interactions between people, their activities, equipment, environment and systems in relevant business strategies
- communication and negotiation skills to:
  - articulate information and ideas clearly
  - effectively and calmly communicate with people at all levels during a time of crisis
- leadership skills to gain trust and confidence of colleagues and stakeholders
- project planning skills to develop and execute potentially complex business continuity planning
- research skills to undertake the necessary background research for the plan
- risk assessment and management skills to consider and mitigate key risks in the development of the plan
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities

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- stress-management skills to work effectively and positively under the pressure of a major incident or situation in the workplace
- technology skills to understand complex information technology issues in the work environment.

Required knowledge

- emergency procedures for site and organisation
- infrastructure employed in a business environment, including facilities, technology, resources and systems
- key personnel within workplace management structure
- OHS requirements in the workplace
- organisational crisis management and disaster recovery plans
- organisational, statutory, regulatory and legislative requirements
- organisation's expectations in relation to continuity of key business activities in time of crisis or incident
- principles of contingency planning
- stress-management techniques.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • develop, implement and review business continuity planning • demonstrate knowledge of organisational, statutory, regulatory and legislative requirements.
Context of and specific resources for assessment	Assessment must ensure access to: • information and databases for analysis activities • relevant legislation, standards and guidelines • training records and minutes of meetings where business continuity has been discussed or training has been implemented.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

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	• direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of and discussion about business continuity principles • review of documented business continuity plan • oral and/or written questioning to assess knowledge of technology and systems employed • analysis of stakeholder feedback • review of training records and communication of plan • review of evaluation of actual situations where business continuity plan was employed.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS606B Develop and implement crisis management processes.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Impacts may include:	• damage to facilities • loss of communications • loss of key staff • loss of systems • trauma to staff.
Business functions may include:	• despatch of field staff • input of data • provision of services • responding to customer contact • services and products the organisation normally provides.
Disaster recovery procedures may include:	• relocation to alternative site • restoration of facility • restoration of technology and data.
Business imperatives may include:	• core functions that have significant impact on customers and organisation

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	• functions determined as priority by organisation • functions required by statutory, regulatory or legislative requirements.
Practical options may include:	• communication plan • manual recording and processing of transactions • recorded messages on interactive voice response (IVR) • responding to generic questions from available information • taking messages and call back requests • transferring activity to alternative site.
Back-up facilities may include:	• alternative site • uninterrupted power supply (UPS) - back-up power.
Follow-up action may include:	• call back or response to contact • data entry of transactions • enquiry investigation and resolution.
Downstream impacts may include:	• impact on competitive position • impact on billing and cash flow • negative media attention • not achieving statutory, regulatory, legislative or organisational requirements • possible negative reaction by customers.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO502A Establish a multicentre

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to develop strategies to establish organisational systems for a multicentre that administers product or service support or sales, or information enquiries from consumers. This may entail being responsible for staff involved in delivering customer service. In many instances the work will occur within the organisation's policies and procedures framework.

Application of the Unit

This unit applies in customer contact environments.

A multicentre may be operated through extensive open workspaces, with work stations that may include computers and a telephone set/headset connected to a telecom switch.

Multicentre oversight can be independently operated or networked with additional centres and linked to a corporate computer network.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

Not applicable.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Plan the oversight of a multicentre	1.1 Assess the ***nature of the multicentre***
	1.2 Develop multicentre plan incorporating needs of ***customers*** in planning processes
	1.3 Ensure plans achieve the ***quality***, time and cost specifications agreed with customers
2. Design multicentre service	2.1 Develop and use ***strategies*** to monitor progress in achieving ***product and service*** targets and standards
	2.2 Develop and use strategies to obtain customer feedback to improve the provision of products and services
	2.3 Develop, procure and use ***resources*** to provide quality products and services to customers
	2.4 Develop strategies to overcome problems and to adapt customer services, products and service delivery in consultation with appropriate individuals and groups
	2.5 Record plans according to the organisation's systems and processes
3. Implement plans to establish the multicentre	3.1 Make provision for staffing or staff training requirements to facilitate achievement of targets and standards
	3.2 Implement work processes and strategies
	3.3 Implement monitoring processes to make provision for future evaluation of targets and standards

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

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Required skills

- communication and negotiation skills to discuss system design features with colleagues
- planning and organising skills to establish and organise customer service delivery
- problem-solving skills to:
  - establish a centre
  - deal with complex and non-routine difficulties and the variety of service details associated with multiple service facets
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities.

Required knowledge

- multicentre service requirements
- multicentre establishment requirements
- multicentre systems operational capacity
- techniques for solving complaints, including the principles and techniques involved in the management and organisation of:
  - customer behaviour
  - customer needs research
  - customer relations
  - ongoing product and service quality
  - problem identification and resolution
- quality customer service delivery
- record keeping and management methods
- strategies for monitoring, managing and introducing ways to improve customer service relationships
- strategies to obtain customer feedback.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to	Evidence of the ability to: • develop plans, policies or procedures for delivering quality

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demonstrate competency in this unit	customer service • solve complex customer issues and multicentre system problems that lead to poor customer service • establish a service and operational practices • demonstrate knowledge of techniques for solving complaints.
Context of and specific resources for assessment	Assessment must ensure access to: • appropriate documentation and resources normally used in the workplace • information and databases for analysis activities • relevant legislation, standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports • demonstration of multicentre planning processes • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of performance in role plays • evaluation of leadership, supervision, coaching and mentoring used to assist colleagues to overcome difficulty in meeting customer service standards • review of strategies developed and used to monitor progress in achieving product and service targets and standards • review of records, reports and recommendations about managing customer service.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Nature of the multicentre may	• independently operated or networked with additional centres • corporate computer network, including mainframes,

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include:	microcomputers and local area networks (LANs) • telephony • voice and data pathways linked through computer telephony integration (CTI) .
Customers may be:	• board members • clients and purchasers of services • co-workers, peers and fellow frontline managers and supervisors • members of the general public who make contact with the organisation, such as prospective purchasers of services • potential funding bodies • suppliers of goods and services and contractors providing goods and services.
Quality may refer to:	• characteristics of a product, system, service or process that meet the requirements of customers and interested parties.
Strategies may refer to:	• databases and other controls to record and compare data over time • electronic feedback mechanisms using intranet, internet and email • feedback forms and other devices to enable communication from customers • long-term or short-term plans for monitoring achievement of targets and standards and evaluating their effectiveness • policies and procedures, including policies for contact escalation • questionnaires, survey and interviews • training and development activities.
Products and services may include:	• goods • ideas • infrastructure • private and public sets of benefits.
Resources may include:	• buildings and facilities • equipment • finance • information • people • power and energy • technology • time.

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Unit Sector(s)

Stakeholder relations – customer service

Custom Content Section

Not applicable.

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BSBCCO503A Manage data interrogation

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to manage data interrogation from a variety of sources, including database systems.

It is expected that someone undertaking this unit would have a detailed knowledge of, and experience in, customer service systems and procedures. Competence in this unit requires preparing, undertaking and recording relevant and required details of information collected according to organisational, legislative and regulatory requirements. It also requires efficient use of technology suitable for this activity.

Application of the Unit

This unit applies to frontline managers, including team leaders and supervisors, responsible for the management of a customer service system and customer service standards.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria

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Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Provide guidance to interrogate data	1.1 Identify information sources 1.2 Assist personnel to collect and record information according to legislation, policy and procedures 1.3 Assist personnel to collate, sort and analyse collected information in relation to the purpose for which it is being obtained
2. Assist personnel to interrogate data	2.1 Identify information that is to be analysed and identify analysis methodology and analysis processes 2.2 Assist personnel to reduce and describe subject to support the development of interpretations 2.3 Review the appropriateness of the reduced information according to organisational processes 2.4 Inform personnel how to archive information not used in the reduction and description processes for future reference 2.5 Implement supervisory processes and checks and measures to ensure work is completed within time available
3. Provide suitable training and assessment opportunities	3.1 Identify learners' personal skill gaps 3.2 Provide appropriate on-the-job training opportunities to fill identified skill gaps and improve work performance 3.3 Provide opportunities for personnel to ask questions and seek clarification on training and work performance matters 3.4 Provide assistance to personnel to ensure compliance with organisational requirements and to access suitable training and assessment

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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to analyse information and data
- communication skills to:
  - communicate with staff and stakeholders
  - use questioning and listening skills to understand and resolve issues raised
- interpersonal skills to:
  - establish rapport and build relationships with customers, team members and stakeholders
  - establish relevant networks
- literacy skills to:
  - prepare and compile statements and reports on complex concepts and ideas
  - write and interpret instructions
- numeracy skills to test assumptions, taking the context of data and circumstances into account
- planning and organising skills to manage own tasks within required timeframes
- presentation skills to articulate information and ideas
- problem-solving skills to find innovative solutions to problems that arise
- risk assessment and management skills to:
  - cover problems and challenges that may arise
  - monitor an organisation’s compliance with service level targets
- self-management skills to:
  - manage self and others
  - seek learning and development opportunities
- technology skills to organise, manage and analyse data.

Required knowledge

- benchmarking principles
- customer expectations and processes for determining customer satisfaction with level of service
- industry standards, best practice and regulatory requirements for service levels
- organisational structure and key stakeholders
- information types and their sources
- procedures and security measures for accessing, storing, retrieving and sharing data from databases
- range of contact data available and technology functionality and reporting capability
- rights of individuals in relation to statement compilation
- use of evidence of contact recording technology.

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Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • collate information in area of responsibility • demonstrate knowledge of statutory, regulatory and legislative requirements with regard to data interrogation • manage and train personnel.
Context of and specific resources for assessment	Assessment must ensure access to: • information and databases for analysis activities • relevant legislation, standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of statements or recording of details of calls • review of compliance with statutory, regulatory, legislative and organisational requirements • oral and/or written questioning to assess knowledge of storage and disposal of information.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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Information sources may include:	• community groups • community leaders • crime, accident or incident scenes • customers • fellow staff • general public • individuals • information databases • local government • local media • schools • specific target groups, in the case of opinion polls and surveys.
Information may include:	• addressing public order and general community issues • assisting in an investigation • details of an incident or medical emergency • locating a specific person • location of witnesses • opinion poll or customer survey • progressing and supporting court hearings and matters.
Analysis may include:	• causative or predictive • descriptive or explorative • quantitative and qualitative or both.
Analysis methodology may include:	• biographical analysis • comparative analysis • Delphi technique • demographic or geographic analysis • historical analysis • hypothesis development • link analysis • scenario generation.
Analysis processes may include:	• deductive: beginning with a hypotheses and testing it; lateral, critical or creative processes • inductive: interpreting raw information, identifying trends or patterns, and testing them • using problem-solving techniques and decision making.
Reduced information may include:	• charts • diagrams • lists • summaries

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	• tables.
Reduction and description processes must include:	• consideration of balance • critical evaluation of additional information collection • objectivity • testing of logical reasoning.
Supervisory processes may include:	• delegating • implementing • monitoring • overseeing • planning • reviewing • targeting.
Time available may include:	• consideration of contingencies • consideration of past experiences • experience of operatives • methods to be employed • resources and equipment to be used.
Training may include:	• computer-based training • contracted training activity • demonstration • formal training • on-the-job training • reading • role play • vendor training.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO504A Integrate customer contact operations in the organisation

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to integrate the customer contact operations fully within the organisation and to ensure that they maintain a high profile and significance within the organisation.

Competence in this unit requires communication and cooperation between customer contact operations and the rest of the business operations. Regular contact, consultation and feedback with the organisation, alignment of objectives, and communication of performance and issues are also required.

Application of the Unit

This unit applies to the integration of customer contact operations into the service and value chains of an organisation.

This work is undertaken by staff with managerial responsibility.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Identify and analyse interdependencies	1.1 Identify ***interdependencies*** between contact centre and other departments within the organisation 1.2 Identify the degree of interdependence 1.3 Map the flow of transactions and information between other departments and the contact centre
2. Analyse value and service chain and identify gaps	2.1 Develop ***value and service chain*** model 2.2 Consult regularly with ***stakeholders*** 2.3 Collect data to support chain continuity and gap identification 2.4 Identify gaps in the value and service chain
3. Prepare plan to close value and service chain gaps	3.1 Identify service chain gaps within the control of customer contact operations 3.2 Communicate other gaps to stakeholders and relevant parties 3.3 Identify activities and resources needed to close gaps 3.4 Prepare an action plan 3.5 Establish a review and feedback process 3.6 Develop internal networks to ensure sound communication across organisation
4. Integrate market intelligence capture into operations	4.1 Consult with organisation marketing area or business unit 4.2 Identify and agree on desired market intelligence 4.3 Integrate data collection into contact guidelines 4.4 Integrate data capture facilities into database 4.5 Integrate information into existing contact centre strategy and operations

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5. Report market intelligence to other corporate departments	5.1 Retrieve captured intelligence information 5.2 Prepare market intelligence reports 5.3 Communicate information to relevant parties in an effective and timely manner

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - analyse workplace information and data
  - use observations of workplace tasks and interactions between people, their activities, equipment, environment and system
- communication skills to:
  - articulate ideas and information
  - communicate effectively with personnel at all levels
  - conduct effective formal and informal meetings
- consultation and negotiation skills to develop, implement and monitor strategies
- interpersonal skills to:
  - establish rapport and build relationships with clients, team members and stakeholders
  - establish relevant networks
- leadership skills to gain the trust and confidence of colleagues and stakeholders
- literacy skills to develop reports that deal with complex ideas and concepts
- numeracy skills to:
  - carry out statistical analysis
  - manage budgetary resources
- planning and organising skills to manage own tasks within required timeframes
- problem-solving skills to create innovative solutions to problems that arise
- research skills to access relevant information and consider available options
- risk assessment and management skills to fully consider impacts of existing or new activities
- self-management skills to:
  - comply with policies and procedures
  - pay attention to detail when making observations and recording outcomes
  - seek learning and development opportunities
- technology skills to organise, manage and analyse data.

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Required knowledge

- analytical methods and techniques, such as:
  - strengths, weaknesses, opportunities and threats (SWOT)
  - balanced scorecard
  - return on investment (ROI)
  - economic value added
- compliance policies and requirements applicable to organisation
- corporate aims and objectives
- market intelligence and data-gathering principles
- information technology infrastructure, functionality and reporting capability
- organisational communication methods
- organisational structure and reporting lines, including key personnel required to effect change
- principles of running effective meetings, and recording and distributing minutes
- risk assessment and management principles.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • analyse interdependencies, and value and service chain • prepare plans to close gaps in value and service chain • integrate and report market intelligence within a customer contact environment • demonstrate knowledge of compliance policies and requirements applicable to the organisation.
Context of and specific resources for assessment	Assessment must ensure access to: • workplace information and data • stakeholder feedback or stakeholders • meeting documentation and minutes • market intelligence reports and analysis • value and service chain model analysis.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for

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	this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of stakeholder feedback • review and analysis of working papers and documentation • review and analysis of organisational interdependencies • review of communication plan and stakeholder meeting minutes • oral and/or written questioning to assess knowledge of market intelligence reports • demonstration of analytical methodology.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Interdependencies may include:	• finance • human resources operations • resourcing • technology and infrastructure.
Value and service chain may include:	• billing • components of the enterprise infrastructure contributing directly to the supply of goods or services to the customer • credit • customer service • field staff • order fulfilment • sales support.
Stakeholders may include:	• administration and support • billing • credit and collections • marketing

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	• finance • human resources • strategy and planning • training.

Unit Sector(s)

Stakeholder relations – customer service

Custom Content Section

Not applicable.

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BSBCCO601B Optimise customer contact operations

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCCO601A Optimise customer contact operations

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to use data and statistical tools to monitor and optimise customer contact processes.

Competence in this unit requires comprehensive knowledge of customer contact operations, and the statistical tools and methodology required to optimise operations.

Application of the Unit

This unit applies in customer contact environments where a variety of statistical control tools are used in monitoring and optimising customer contact operations.

This work is undertaken by specialists, team leaders and managers, depending on the size and structure of the centre.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Analyse customer contact processes using statistical tools	1.1 Identify ***customer contact processes*** requiring analysis 1.2 Measure the impact of these processes on ***service levels*** or other indicators using statistical tools 1.3 Derive tolerance levels for processes 1.4 Calculate upper and lower control limits from data 1.5 Investigate reasons for performance outside of control limits
2. Rectify productivity impediments	2.1 Conduct a qualitative and quantitative analysis of current ***productivity*** against organisational standards and aims 2.2 Identify causes of productivity impediments 2.3 Apply service quality and quality management tools to minimise impediments 2.4 Confirm that operations achieve productivity standards
3. Conduct a process review	3.1 Identify components of the process under review 3.2 Analyse and modify process to achieve improved performance using ***graphical techniques*** 3.3 Trial and revise modified process to meet organisational efficiency standards 3.4 Document revised process using graphical techniques
4. Benchmark customer contact operations	4.1 Identify appropriate target areas for process improvement 4.2 Research and nominate ***benchmarking organisations*** that demonstrate relevant best practice

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	4.3 Document relevant best practice processes used by benchmarking organisations 4.4 Identify processes from benchmarking organisations that can be adopted 4.5 Identify relevant benefits and risks associated with implementing new processes 4.6 Adapt best practice processes to meet enterprise conditions 4.7 Identify and document appropriate performance indicators for evaluation of the new processes

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - analyse relevant workplace information and data
  - make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
- communication skills to articulate information across all communication media
- consultation and negotiation skills to:
  - develop plans
  - implement and monitor designated actions
- interpersonal skills to:
  - build relationships with clients, team members and stakeholders
  - establish relevant internal and external networks
- leadership skills to gain the trust and confidence of colleagues and stakeholders
- numeracy skills to calculate, manipulate and validate data and statistics
- planning and organising skills to manage own tasks within required timeframes
- problem-solving skills to create innovative solutions to problems
- project management skills to:
  - achieve continuous improvement
  - conduct action planning
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities
- technology skills to:
  - access and use information and data

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- produce reports and graphical representations.

Required knowledge

- at least one complete suite of statistical control systems
- benchmarking principles
- customer contact processes and the range of channels available
- customer service principles and processes
- operating variables within customer contact operations
- principles of statistics, statistical process control and underpinning statistical calculations
- process review and documentation principles
- project management principles
- quality management and related process control methods.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • analyse statistical reports of contact centre process performance • explain or demonstrate process improvement strategies • analyse records of customer contact productivity measures • explain productivity improvement methodology • demonstrate knowledge of quality management and related process control methods.
Context of and specific resources for assessment	Assessment must ensure access to: • information, reporting and databases for analysis activities • relevant standards and guidelines • benchmarking analysis and improvement plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate

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	• review of process documentation • analysis of peer and line management feedback • review of statistical reports of contact centre process performance • analysis of process improvement strategies • review of records of customer contact productivity measures • analysis of explanation of productivity improvement methodology • review of graphical records of customer contact processes • review of records of analysis for operations benchmarking.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO602B Manage customer contact information.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Customer contact processes may include:	• email and other electronic communications • face-to-face contact • facsimile and other written communications • inbound and outbound telephone contact • service and sales support processes.

Service levels may include:	• predetermined conditions for customer contact service, including:
	  • contact duration
	  • contact wait time
	  • contact escalation policy
	  • percentage of calls answered within specified time period
	  • service guarantees
	  • speed of response.

Productivity may include:	• average speed of answer • first call resolution • measuring calls per day, week or hour • measuring financial returns, sales volumes or services

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	provided • overall performance of the customer contact operation • service level results.
Graphical techniques may include:	• fishbone diagrams • flowcharts • Gantt or Pert charts • maps • Pareto charts.
Benchmarking organisations may include:	• best practice organisations, which may be in an unrelated industry • competitors • organisations in same industry • organisations with similar functions.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO602B Manage customer contact information

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Replaces BSBCCO602A Manage customer contact information

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to manage customer contact information and the management information systems (MIS) used in a customer contact environment.

Managers design specific implementation programs within these systems, including data collection, measurement types and patterns, and reporting strategies, as well as managing the use of information obtained.

Competence in this unit requires using MIS to produce accurate and relevant information and reporting that support the efficient running of the centre or business unit. It also requires knowledge of the requirements to design, implement and tailor information systems to meet the changing needs of the environment.

Application of the Unit

This unit applies to customer contact activity in a small, medium or large organisation.

This work is undertaken by specialist staff or those with managerial responsibility, depending on the size and structure of the centre.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Select and set activity and transaction records and measurements	1.1 Analyse ***business plan*** and budget to identify relevant business information needs 1.2 Identify possible ***contact pathways*** 1.3 Identify measurement methods and ***MIS*** used in each step in contact pathway 1.4 Configure information systems to capture required measurements 1.5 Develop and implement testing procedures for transaction and call/contact pathway measurements
2. Collect data	2.1 Identify data-collection methods in information technology systems used 2.2 Monitor quantitative and qualitative data collection to ensure accuracy 2.3 Ensure data collection is segmented or sorted as required and provides the correct levels of information
3. Analyse MIS resulting from customer contact activities	3.1 Identify call/contact traffic and transaction patterns, and other trends and activities 3.2 Apply correct data analysis methodologies 3.3 Accurately interpret data
4. Prepare and present information	4.1 Identify ***stakeholders*** for contact centre information 4.2 Tailor contact centre information presentations for each stakeholder as appropriate

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	4.3 Present both short- and long-term contact centre information system reports as required

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to interpret, report and recommend actions from complex data and information
- communication skills to:
  - communicate effectively with personnel and clients at all levels
  - conduct effective formal and informal meetings
- interpersonal skills to:
  - establish rapport and build relationships with clients, team members and stakeholders
  - develop and participate in relevant networks
  - leadership skills to gain the trust and confidence of colleagues and clients
- numeracy skills to:
  - manage budgetary resources
  - read, validate and interpret data
- presentation skills to:
  - articulate information and ideas clearly
  - develop and present reports that deal with complex ideas and concepts
- problem-solving skills to create innovative solutions to problems or challenges
- research and data-collection skills to conduct comprehensive and accurate reporting
- self-management skills to:
  - comply with policies and procedures
  - pay attention to detail when making observations and recording outcomes
  - seek learning and development opportunities
- technology skills to:
  - organise and present data
  - use information technology.

Required knowledge

- budgetary requirements and principles
- business plans and objectives
- call and other contact traffic MIS
- meeting and minute taking principles

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- methods of collecting reliable information and data and commonly encountered problems, and strategies for overcoming such problems
- organisational models and structures for managing customer contact information and the roles of key people
- principles of electronic information management and methods of reporting information
- reporting requirements and methodology.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • develop, use, analyse and manage information systems to provide reliable and appropriate information and reporting to support the effective operation of a customer contact environment • demonstrate knowledge of call and other contact traffic MIS.
Context of and specific resources for assessment	Assessment must ensure access to: • information and databases for analysis activities • relevant guidelines and standards • stakeholder feedback.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of business plan analysis and reporting needs • review of records of call pathways and related information systems • review of reports from information systems demonstrating a cohesive report plan • analysis of call traffic reports with reference to varying levels of contact centre operations • demonstration of reports tailored for different audiences • oral and/or written questioning to assess knowledge of business models and models for contact centres

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	• review of ability to relate business plans and models to the information needs of an enterprise.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO601B Optimise customer contact operations.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Business plan may include:	• action plans • business objectives • desired business outcomes • financial or budgetary targets • standards and guidelines • targets.
Contact pathways may include:	• automated call distribution (ACD) systems • contact management systems • email • facsimile • internal transfers and escalations • interactive voice response (IVR) • letter • telephone • web-based contacts.

MIS may include:	• range of computer systems used in receiving, routing and reporting on contact centre communications traffic, including:
	  • data generating and data recording components of telephone, ACD and IVR systems
	  • add-on systems that integrate with these systems.

Stakeholders may include:	• centre staff • management • other internal departments • own team • vendors and external contractors.

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Unit Sector(s)

Stakeholder relations – contact centre operations

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BSBCCO603B Design and launch new customer contact facilities

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCCO603A Design and launch new customer contact facilities

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to design and establish new customer contact facilities.

Competence in this unit requires knowledge of the technology required, the human resources, the legislative and regulatory requirements – including occupational health and safety (OHS) requirements, organisational standards and guidelines, and global best practice in design and features of customer contact facilities.

Application of the Unit

This unit applies to the design and establishment of new customer contact facilities, including both new centres and substantial enhancement of existing centres.

In the first instance this unit will typically apply to a new contact centre. However, it may also include a substantial upgrade in technology and physical resources to an existing contact centre or the introduction of a significant increase in capacity of an existing contact centre.

This work is undertaken by staff with managerial responsibility, but it may also be undertaken by specialist staff (e.g. operations manager, project manager), depending on the size and structure of the organisation.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

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Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Identify design elements	1.1 Analyse role and business needs of proposed customer contact facility 1.2 Define general characteristics of customer contact facility 1.3 Identify ***design elements*** to meet business needs 1.4 Confirm analysis with ***stakeholders***
2. Develop detailed specifications	2.1 Review facility design principles to confirm appropriateness of design 2.2 Delegate facility design elements to appropriately experienced specialist/s for detailed specification 2.3 Benchmark facility design against world-class standards to demonstrate appropriateness of specifications 2.4 Confirm design specifications with stakeholders
3. Evaluate resources	3.1 Identify budgetary limits for facility 3.2 Identify suitable resources available from organisation’s preferred suppliers 3.3 Identify suitable alternative resources and suppliers for each design aspect 3.4 Conduct comparative analysis of each alternative

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	3.5 Recommend resources for each design aspect
4. Integrate design components	4.1 Prepare viable project management plan for the integration of new facility resources 4.2 Use ***project management tools*** throughout the integration process 4.3 Prepare contingency plans to meet all reasonable costs 4.4 Develop effective ***testing procedures and plans*** for all resources 4.5 Maintain vigilance over budget, quality of supplied resources, and quality of work 4.6 Communicate progress and concerns arising to senior management in a timely way
5. Launch customer contact facility	5.1 Prepare viable project management plan for the ***launch of the new customer contact facility*** 5.2 Use project management tools throughout launch process 5.3 Communicate launch parameters to relevant stakeholders 5.4 Establish pre-launch operational test procedures and launch plans 5.5 Supervise launch to completion according to plans and contingencies 5.6 Review launch and debrief stakeholders to plan ***follow-up actions***

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to analyse relevant workplace information and data, and make recommendations accordingly
- communication skills to:
  - conduct formal and informal meetings
  - communicate with clients and personnel at all levels
- consultation and negotiation skills to develop, implement and monitor plans
- literacy skills to prepare reports containing complex ideas and concepts
- numeracy skills to:
  - carry out analysis of statistics and data

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    - manage budgetary resources
- planning and organising skills to manage own tasks within required timeframes
- presentation skills to:
    - articulate information, expectations and ideas clearly
    - research and present on complex issues, such as regulatory and legislative requirements
- project management skills to manage the complexities and scope of a large project
- risk assessment and management skills to understand the impacts and risks associated with the project
- self-management skills to:
    - comply with policies and procedures
    - seek learning and development opportunities
    - technology skills to manage data and information.

Required knowledge

- benchmarking methodology
- change management principles
- legislative, regulatory and organisational requirements for customer contact facilities
- principles of testing procedures and plans
- principles underpinning contact centre design at both the technology level and the human level, such as:
    - emerging technologies
    - ergonomics of office design
    - hardware and telecommunications services
    - software systems
- project management principles
- research methods using a range of information sources
- risk management principles
- sources of information, guidance and support for the project
- systems and physical resources used effectively in customer contact environments.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for	Evidence of the ability to:

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assessment and evidence required to demonstrate competency in this unit	• design, project manage, implement and launch a new or significantly re-engineered customer contact facility • demonstrate knowledge of legislative, regulatory and organisational requirements that cover the task.
Context of and specific resources for assessment	Assessment must ensure access to: • information and databases for analysis activities • relevant legislation, regulations, standards and guidelines • stakeholder and staff satisfaction feedback. It is unlikely that competence could be assessed in a simulated environment. A significant degree of delegation of tasks to specialists may be required.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of all aspects of project plan, including achieved timeframes • analysis of stakeholder and staff satisfaction feedback • review of benchmarking activities • review of testing program, plan and results • review of OHS, regulatory and legislative compliance • review of budget–actuals to forecast or business case • review of communication materials used in consultation with various types of stakeholders • review of documentation of design specifications, including explanations of personal inputs.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO601B Optimise customer contact operations • BSBCCO602B Manage customer contact information • BSBCCO608B Manage customer contact operational costs.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Design elements may include:	• customer service strategies • external services, such as telecommunications • human resources • physical resources, including OHS considerations • software • technology, including systems and telephony.
Stakeholders may include:	• finance department • human resources and OHS • information technology department • internal and external customers and vendors • property and facilities department • senior management.
Project management tools may include:	• communication and knowledge management applications • costing applications • quality control applications • risk assessment and management applications • scheduling applications • tracking applications.
Testing procedures and plans may include:	• development of test scenarios • development of work instructions • end-to-end testing of resources • predetermined parameters for determining success or failure of testing • regression testing (‘what if’ scenarios) • remedial plan for unsuccessful test results • schedule of testing in lead-up to opening • stakeholder sign-off • user acceptance testing.
Launch of the new customer contact facility may include:	• adjusting systems to meet contingencies • demonstrating new facilities and systems to stakeholders, including management, clients and staff • initial use of new systems and facilities • transferring from existing systems to new systems.

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Follow-up actions may include:	• adjusting the overall design • adjusting the set-up of specific resources • reporting to stakeholders, regardless of the degree of success of the launch.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO604B Develop and maintain a service level strategy

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCCO604A Develop and maintain a service level strategy.

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to establish, monitor and maintain a service level strategy in a customer contact environment.

Competence in this unit requires developing and implementing a successful service level strategy to achieve the service levels required by an organisation and the associated processes required to establish that service level.

Application of the Unit

This unit applies in customer contact environments where the achievement of this service level may be a regulatory or organisational requirement and is normally organisation-specific.

This role is undertaken by staff with managerial responsibility, although specialist staff may undertake it under supervision, depending on the size and structure of the centre.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Analyse historical data	1.1 Distinguish between ***contact wait characteristics*** and ***service level*** data 1.2 Collect relevant and accurate service level data 1.3 Determine historical service levels for service level periods 1.4 Collect relevant and accurate contact wait time, abandonment rate and customer survey data 1.5 Determine historical contact wait and abandon time characteristics
2. Formulate a service level policy	2.1 Identify the difference and impacts of providing the required service level against the ***industry standard*** 2.2 Consult with relevant ***stakeholders*** on contact wait characteristics and service levels 2.3 Identify business needs related to service levels 2.4 Review organisation's contact wait characteristics in relation to the industry, the market and competition 2.5 Formulate a comprehensive set of appropriate contact wait characteristics 2.6 Define and document an appropriate service level policy or target 2.7 Develop comprehensive contingency plans for loss of facilities or technology 2.8 Identify and document corresponding resource requirements 2.9 Communicate and justify service level policy to senior

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	management and stakeholders
3. Monitor and maintain service levels	3.1 Identify measurement capabilities of existing technology 3.2 Select diagnostic measures to monitor service levels 3.3 Collect and analyse service level data 3.4 Identify under-performing ***service level periods*** 3.5 Analyse service level inputs and recommend corrections to maintain service levels 3.6 Conduct ***benchmarking*** to compare performance to competitors and industry best practice

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - analyse workplace information and data
  - make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
- communication skills to:
  - communicate effectively with personnel at all levels
  - conduct effective formal and informal meetings
- consultation and negotiation skills to develop, implement and monitor strategies
- interpersonal skills to:
  - establish rapport and build relationships with clients, team members and stakeholders
  - establish relevant networks
- literacy skills to prepare and present reports on complex concepts and ideas
- numeracy skills to:
  - consider and manage service level consistent with budget and resources
  - test assumptions, taking the context of data and circumstances into account
- planning and organising skills to manage own tasks within required timeframes
- presentation skills to articulate information and ideas effectively
- problem-solving skills to create innovative solutions to problems that arise
- risk assessment and management skills to:
  - cover problems or challenges that may arise
  - monitor an organisation’s compliance with service level targets
- self-management skills to:

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- comply with policies and procedures
- pay attention to detail when making observations and recording outcomes
- seek learning and development opportunities
- technology skills to organise, manage and analyse data.

Required knowledge

- benchmarking principles
- business and financial planning (budget) principles
- business requirements for service level performance, which may include regulatory requirements
- contact data available and technology functionality and reporting capability
- industry standards, best practice and regulatory requirements for service levels
- organisational structure and key stakeholders
- processes for determining customer expectations and satisfaction with level of service
- structure and organisation of workforce, including part-time, casual, contract and shift workers.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • develop a service level strategy that consistently meets the requirements of a customer contact organisation, including documenting processes and policy, and maintaining reports and records • demonstrate knowledge of industry standards, best practice and regulatory requirements for service levels.
Context of and specific resources for assessment	Assessment must ensure access to: • information and databases for analysis activities • relevant legislation, regulations, standards and guidelines • stakeholder feedback.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

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	• direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of stakeholder feedback • review of service level performance • review of process and service level policy documentation • review of documentation of poor service level performance • review of reporting and historical data, along with analysis • practical demonstration of effective use of customer contact technology • review of financial performance and resourcing budget.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO601B Optimise customer contact operations • BSBMGT618A Develop a contact centre business plan.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Contact wait characteristics may include:	• abandonment rates • breakdown of waiting times • related indicators of caller responses to waiting periods.
Service level may include:	• abandonment rates • average speed of answer • contact escalation policy • percentage of calls answered within a defined waiting period.
Industry standard may include:	• best practice service level • regulated service level requirement • service level set by individual organisations.
Stakeholders may include:	• finance • human resources • market research • occupational health and safety • sales and marketing

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	• senior customer service and executive staff.

Service level periods may include:	• calculating service levels at varying periods of time, such as:
	  • half hourly
	  • hourly
	  • daily
	  • weekly
	  • monthly
	  • yearly.

Benchmarking may include:	• best practice across all industry sectors
	• comparison with other organisations, including:
	  • other internal departments
	  • industry sector
	  • other industry sectors
	• targeted competitor.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO605B Develop and maintain a customer contact marketing strategy

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCCO605A Develop and maintain a customer contact marketing strategy

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to develop, maintain and promote a marketing strategy in a customer contact environment.

Competence in this unit requires developing, implementing and reviewing a marketing strategy, and building strong relationships with all stakeholders. The effective use and development of systems, databases and reporting tools are also required.

Application of the Unit

This unit applies to establishing a marketing strategy in a customer contact environment that has sales and marketing opportunities for either internal or external (outsource) stakeholders.

This role is undertaken by staff with managerial responsibility.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Apply sales and marketing principles to contact centre performance	1.1 Select a valid framework of sales and marketing principles for a customer contact centre 1.2 Achieve consensus on sales and marketing principles with ***stakeholders*** 1.3 Integrate sales and marketing principles into customer contact operating objectives and strategies 1.4 Identify elements of customer contact centre ***supply chains*** 1.5 Promote contact centre effectively to supply chain customers
2. Initiate, evaluate and maintain a marketing database system	2.1 Identify appropriate ***marketing database fields*** and functions 2.2 Contribute to the development and testing of a marketing database 2.3 Evaluate and enhance functionality of the marketing database to best serve the marketing operation 2.4 Establish effective database maintenance procedures 2.5 Establish ***contingency planning*** for failure of databases and systems
3. Develop and evaluate customer service and retention strategies	3.1 Identify effective after-sales support strategies 3.2 Develop strategies to retain customers and to build loyalty 3.3 Establish processes to facilitate ***after-sales support and customer retention strategies*** 3.4 Monitor and review after-sales support and customer retention processes

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	3.5 Adjust processes to optimise customer service and retention
4. Analyse sales and customer activity results	4.1 Identify sales and service report criteria relevant to the interests of stakeholders 4.2 Analyse sales and service data in relation to key performance indicators 4.3 Report on performance and activity data to stakeholders in a timely manner

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - analyse workplace information and data
  - assess compliance with relevant legislative, regulatory and organisational requirements
  - consider all options and support the development of the strategy
- communication skills to:
  - communicate effectively with personnel at all levels
  - conduct effective formal and informal meetings
- consultation and negotiation skills to develop, implement and monitor strategies
- interpersonal skills to:
  - establish rapport and build relationships with internal and external customers, team members and stakeholders
  - establish relevant networks
- leadership skills to gain the trust and confidence of colleagues and clients
- literacy skills to:
  - prepare and present reports on complex concepts and ideas
  - write policies, procedures and plans
- numeracy skills to:
  - manage budgetary resources
  - understand, verify, manipulate and calculate data and statistics
- planning and organising skills to manage own tasks within required timeframes
- presentation skills to articulate information and ideas effectively
- problem-solving skills to create innovative solutions to problems that arise
- project management skills to:
  - develop and implement the strategy successfully
  - achieve ongoing continuous improvement

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- risk assessment and mitigation skills to fully understand and, if necessary, mitigate potential impacts of activities
- self-management skills to:
  - comply with policies and procedures
  - pay attention to detail when making observations and recording outcomes
  - seek learning and development opportunities
- technology skills to organise, manage and analyse data.

Required knowledge

- contact centre information systems and the types of data and information available from these systems
- contingency planning principles
- customer retention strategies
- industry and marketplace/competitor marketing strategies
- information technology options and functionality within the customer contact centre environment
- process review and documentation processes
- sales and marketing principles
- use and development of databases.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • apply marketing principles to customer contact performance • develop and maintain marketing databases • develop customer service and retention strategies • analyse and report performance within a customer contact environment • demonstrate knowledge of sales and marketing principles.
Context of and specific resources for assessment	Assessment must ensure access to: • information and databases for analysis activities • relevant legislation, standards and guidelines • stakeholder feedback or stakeholders • performance and target data.

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Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of stakeholder agreed marketing and sales principles • review of records of internal contact centre promotion activities • oral and/or written questioning to assess knowledge of fields and functionality of a marketing database • review of records of maintenance activity for a marketing database • review of documentation of after-sales and/or customer retention strategies • review of records of after-sales and/or customer retention strategy effectiveness • review of reports of sales and customer service performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO609B Integrate customer contact operations within the organisation • BSBMGT618A Develop a contact centre business plan.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Stakeholders may include:	• contact centre level:
	  • direct team
	  • team leaders
	  • other senior contact centre staff
	• enterprise employees at management level with an interest or stake in contact centre operations, including:
	  • sales and marketing

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	• credit and collections • billing • external clients and suppliers with an interest in the marketing aspects of operations, including: • contracting organisations • recruitment suppliers • software and equipment suppliers.
Supply chains may include:	• billing • credit and collections • customer service • fulfilment area • sales and sales support.
Marketing database fields may include:	• address: postal, business and residential • contact numbers • current products and services • email address • name • occupation • previous offers.
Contingency planning may include:	• activities to keep business running • contact escalation policy • interactive voice response (IVR) message re reduced level of service • taking messages and calling customers back when systems are back in operation • temporary redirection of calls to another area • use of back-up systems or database • use of manual processes or recording.
After-sales support and customer retention strategies may include:	• account management • courtesy follow-up calls • customer satisfaction surveying • differentiated levels of customer service and support • discounts or special offers • follow-up to ensure customer satisfaction and loyalty post-sales experience • loyalty programs • offers of value-added services or products.

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Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO606B Forecast and plan using customer contact traffic information analysis

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCCO606A Forecast and plan using customer contact traffic information analysis.

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to analyse call or contact traffic information to forecast and plan resourcing for customer contact operations.

Competence in this unit requires the use of queuing theory to forecast call or contact volumes, and assessing and planning appropriate resourcing levels to meet the requirements of the organisation.

Application of the Unit

This unit can be undertaken by specialist staff, operational management staff, or those with managerial responsibility, depending on the size and structure of the centre.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Analyse contact traffic data	1.1 Confirm the accuracy and appropriateness of ***contact traffic data*** 1.2 Identify call or contact traffic patterns over short and long ***intervals*** 1.3 Identify anomalies and non-recurring events in contact patterns
2. Interpret the impact of customer contact phenomena on forecasting and planning	2.1 Define and identify the range of ***contact centre or customer contact phenomena*** affecting resource planning 2.2 Analyse and explain impact of phenomena 2.3 Identify issues arising from the impact of customer contact phenomena when forecasting and planning
3. Develop contact traffic forecasts	3.1 Provide a baseline for forecast by collecting historical data 3.2 Collaborate with marketing, financial control and other areas to incorporate budget expectations and marketing efforts into forecast 3.3 Break down annual forecast into smaller periods and adjust for seasonality 3.4 Ensure that forecast accuracy is within organisational requirements
4. Plan labour requirements	4.1 Determine basic inputs to ***queuing tools*** 4.2 Calculate resources required using queuing tools 4.3 Adjust results to account for ***quantitative and qualitative factors*** 4.4 Perform planning process and ***scheduling*** for all levels of forecasted call and contact traffic

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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - analyse workplace information and data
  - consider all options and support the development of the strategy
  - use observations of workplace tasks and interactions between people and their activities, equipment, environment and systems
  - pay attention to detail when making observations and recording outcomes
- communication skills to:
  - communicate effectively with personnel at all levels
  - conduct effective formal and informal meetings
- consultation and negotiation skills to develop, implement and monitor strategies
- leadership skills to gain the trust and confidence of colleagues and stakeholders
- literacy skills to prepare and present reports on complex concepts and ideas
- numeracy skills to:
  - carry out arithmetical calculations
  - analyse trends and patterns
  - manage budgetary resources
- planning and organising skills to manage own tasks within required timeframes
- presentation skills to articulate information and ideas effectively
- problem-solving skills to create innovative solutions to problems that arise
- project management skills to:
  - develop and implement the strategy successfully
  - achieve ongoing continuous improvement
- risk assessment and mitigation skills to fully understand and, if necessary, mitigate potential impacts of activities
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities
- technology skills to organise, manage and analyse data.

Required knowledge

- business planning and budgeting principles
- contact traffic measurement systems

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- external factors and contact centre operational factors potentially impacting on planning and forecasting
- operating environment requirements and objectives
- organisational communication methods
- principles of statistical analysis and reporting
- queuing and forecasting tools
- scheduling techniques.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • prepare contact forecasts and calculate resources required to support these forecasts • demonstrate knowledge of contact traffic measurement systems.
Context of and specific resources for assessment	Assessment must ensure access to: • information and databases for analysis activities • standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of forecasts against actuals • review of reports and explanation of historical call traffic data • review of reports and explanation of resource calculations • review of call and contact traffic forecasts for a range of timeframes, including consideration of contingencies and external factors • oral and/or written questioning to assess knowledge of the impact of customer contact phenomena on forecasting • review of stakeholder feedback.
Guidance information	Holistic assessment with other units relevant to the industry

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for assessment	sector, workplace and job role is recommended, for example: • BSBCCO601B Optimise customer contact operations • BSBCCO608B Manage customer contact operational costs.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Contact traffic data may include:	• data extracted from customer contact systems that:
	  • can detail statistics, such as numbers, types and times of calls
	  • may be sorted and tabulated for individual agents and groups of agents
	• data on other types of contact:
	  • email
	  • face-to-face
	  • letters
	  • SMS (text messages)
	  • website.

Intervals may include periods for reporting, which may be:	• annual • daily • half hourly • hourly • seasonal • weekly.
Contact centre or customer contact phenomena may include:	• administration duties • billing and credit issues • climate, environmental and health factors • equipment failures • excessive call lengths • excessive leave commitments • external influences or factors • marketing and competitor activity • media attention • training periods and team meetings.

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Queuing tools may include:	• Erlang B and C tools • facilities within automated call distribution (ACD) systems which provide the capacity to sort and queue different types of calls according to pre-set business rules.
Quantitative and qualitative factors may include:	• call cost considerations • marketing activity • seasonal variations • variations in staff availability.

Scheduling may include:	• business demands, goals and key performance indicators (KPIs)
	• forecasting enquiries by using a forecasting model that uses weighted averages from previous scheduling periods, including:
	  • calls
	  • email
	  • escalations
	  • mail
	• employee preferences
	• heuristic, where call sequence is ordered by customer balance
	• legislation and regulations
	• operational constraints
	• scheduling methods, such as:
	  • batch optimised: hourly scheduling (16-hourly lists)
	  • dynamic optimised: hourly scheduling (re-optimised at the beginning of every hour)
	• work function projections, incorporating quality and quantity.

Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO607B Manage customer contact centre staffing

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCCO607A Manage customer contact centre staffing .

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to maintain stable and productive staffing levels in a business unit within an organisation.

Competence in this unit requires broad management skills, including people management, as well as knowledge of recruitment, remuneration, incentive and compliance issues.

Application of the Unit

This unit applies in a business environment where a manager has overall responsibility for the recruitment, induction, retention and training, and regulatory and legislative compliance of staff.

This work is undertaken by those with managerial responsibility.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Develop and apply recruiting and staff retention strategies	1.1 Develop and maintain ***job descriptions*** for customer contact roles 1.2 Develop and maintain ***position profiles*** for customer contact roles 1.3 Apply staff selection processes using ***interviewing techniques*** 1.4 Identify critical ***churn factors*** by analysing records of staff turnover and exit interviews 1.5 Introduce staff retention strategies to reduce churn
2. Manage induction and ongoing staff training	2.1 Arrange for staff skill levels to be audited 2.2 Arrange the identification of skill needs and skill gaps for all customer contact roles 2.3 Distinguish between technology skill and customer service skill needs 2.4 Develop training plans to meet identified skill gaps 2.5 Identify suitable sources of training support 2.6 Arrange training programs to reduce skill gaps for all staff
3. Establish a performance management program	3.1 Develop and maintain ***key performance indicators*** (KPIs) or competency sets for all staff 3.2 Agree on KPIs with each customer contact staff member 3.3 Plan and maintain review dates and data collection to enable performance management 3.4 Conduct performance reviews and produce personal development plans
4. Manage remuneration and incentive programs	4.1 Determine KPIs for individuals and groups 4.2 Set appropriate remuneration levels for job accountabilities

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	and industry 4.3 Initiate ***incentive schemes*** using KPIs that are within the control of staff 4.4 Regularly review remuneration and incentive schemes to ensure effectiveness 4.5 Implement audit process to ensure integrity of programs
5. Manage compliance with statutory and regulatory requirements	5.1 Maintain personal and staff awareness of relevant statutory and regulatory requirements 5.2 Ensure total compliance with statutory and regulatory requirements 5.3 Identify, record and rectify breaches of ***statutory and regulatory requirements*** 5.4 Implement compliance training and review programs as required

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - analyse relevant workplace information and data
  - make observations of workplace tasks and interaction between people, their activities, equipment, environment and systems
- consultation and negotiation skills to:
  - collate and record information
  - communicate effectively verbally and in writing
  - develop and implement plans
- interpersonal skills to:
  - establish rapport and build relationships with customers, team members and stakeholders
  - establish relevant networks
- interviewing and recruitment skills to arrive at effective selection outcomes
- literacy skills to:
  - articulate information and ideas clearly
  - prepare and present reports and presentations containing complex ideas and concepts
  - write policies, procedures and plans
- numeracy skills to:

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    - carry out analysis and validation of data and information
    - manage budgetary resources
- planning and organising skills to manage own tasks within required timeframes
- problem-solving skills to find innovative solutions to problems
- self-management skills to:
    - comply with policies and procedures
    - seek learning and development opportunities
- technology skills to manage and analyse data and information.

Required knowledge

- employee and industrial relations principles
- equal employment opportunity guidelines
- interviewing principles
- legislative, regulatory and organisational policy framework
- organisational recruitment process, including role definition, selection criteria, direct and indirect assessment processes
- range of reward and recognition strategies and initiatives
- skill auditing and training gap analysis methodologies
- strategies for the development of a positive compliance culture
- succession planning principles
- training program design principles.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to:
	• manage a business unit, encompassing:
	  • compliance with relevant legislation, regulations and codes
	  • induction
	  • management of remuneration and incentive programs
	  • performance management
	  • recruitment
	  • training
	• demonstrate knowledge of legislative, regulatory and

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	organisational policy framework.
Context of and specific resources for assessment	Assessment must ensure access to: • information and databases for analysis activities • relevant legislation, standards and guidelines.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:
	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate
	• review of:
	  • documentation of training programs
	  • documentation of compliance programs
	  • copies of position descriptions and position profiles
	  • documentation of incentive and remuneration programs
	  • documentation of staff retention strategies and supporting data and assessment
	  • performance against KPIs
	  • staff satisfaction surveys and results
	  • churn rates and trends.

Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Job descriptions may include:	• accountabilities • experience required • qualifications required • skills and knowledge required • special requirements • specification of the duties for an individual employee.

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Position profiles may include:	• classification of roles • remuneration levels • set of competency statements to assist in defining the role • specification of dimensions of a position within an organisational structure.
Interviewing techniques may include:	• competency and behavioural-based questions • fair recruitment practices.
Churn factors may include:	• external factors, such as higher pay rates elsewhere • lack of career progression • lack of feedback • lack of training • leadership issues • physical environment • recognition or reward • stress.
Key performance indicators may include targets for:	• adherence to roster • availability • average handling time • call volumes • quality • retention • relevant measures for specific roles • sales • sales conversion rates • seeking learning and development opportunities.
Incentive schemes may include:	• commissions • incentive payments • non-cash rewards, such as time off • remuneration adjustment • reward and recognition programs.

Statutory and regulatory requirements may include:	• award and enterprise agreements
	• national, state or territory legislative requirements, especially in regard to occupational health and safety
	• industry-related codes and regulations, such as:
	  • Consumer Credit Code
	  • Privacy Act
	  • Trade Practices Act/Competition and Consumer Act

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Unit Sector(s)

Stakeholder relations – contact centre operations

Custom Content Section

Not applicable.

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BSBCCO608B Manage customer contact operational costs

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCCO608A Manage customer contact operational costs.

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to manage costs in a customer contact environment. It requires the application of well-developed skills and knowledge in effective financial management and management of the budgetary process.

Competence in this unit requires extensive knowledge of the industry and marketplace, well developed analytical and research skills, and the ability to work with data and statistics.

Application of the Unit

This unit applies in customer contact environments that operate under a considerable degree of statistical control, using high levels of technology.

This work is undertaken by those with managerial responsibility.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Calculate cost for contact centre operations	1.1 Identify cost-generating contact centre transactions 1.2 Calculate ***transaction costs*** 1.3 Identify clearly fixed and variable components of transaction costs
2. Prepare budget for customer contact operation	2.1 Produce accurate estimates of expected ***revenue*** supported by business and financial records 2.2 Identify expected ***operating expenses*** based on realistic projections 2.3 Identify proposed ***capital expenditure*** based on business plans and estimates 2.4 Work closely with ***stakeholders*** to identify factors that may influence operations and costs 2.5 Prepare justifiable high, low and expected budget scenarios
3. Present and justify budget	3.1 Deliver an effective presentation of customer contact centre budget 3.2 Justify aspects of operating expenses, revenues and capital expenditure 3.3 Introduce qualitative information into justification when appropriate
4. Monitor budget performance	4.1 Correlate ***statistical performance*** of contact centre to budget estimates 4.2 Closely monitor variations between actual budget reporting and expected budget 4.3 Maintain accurate tracking of accrued, invoiced and other costs

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	4.4 Identify cash flow implications for current and planned events 4.5 Communicate progress against budget to stakeholders
5. Control financial operations of the customer contact operation	5.1 Closely monitor reasonable threats to budget on a regular basis 5.2 Identify variations in contact centre performance that present threats to financial performance 5.3 Identify operational strategies to minimise threats to budget 5.4 Regularly monitor staff compliance with financial delegation limits 5.5 Regularly update organisation's ***financial control systems***

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - analyse workplace information and data
  - use understanding of budget scenarios, sensitivities and threats
- communication skills to:
  - communicate effectively with personnel at all levels
  - conduct effective formal and informal meetings
- consultation and negotiation skills to develop, implement and monitor strategies
- interpersonal skills to:
  - establish rapport and build relationships with clients, team members and stakeholders
  - establish relevant networks
- literacy skills to prepare and present reports containing complex information, data and concepts
- leadership skills to gain the trust and confidence of colleagues and stakeholders
- numeracy skills to:
  - deal with the data and statistical information required to establish and monitor the budget
  - manage budgetary resources
- planning and organising skills to manage own tasks within required timeframes
- presentation skills to articulate information and ideas effectively
- problem-solving skills to create innovative solutions to problems that arise
- research skills to access relevant information and consider available options

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- risk assessment and mitigation skills to identify threats to the customer contact centre budget and to implement remedial actions
- self-management skills to:
  - comply with policies and procedures
  - pay attention to detail when making observations and recording outcomes
  - seek learning and development opportunities
- technology skills to organise, manage and analyse data.

Required knowledge

- accounting principles
- benchmarking principles
- budgeting principles
- cost-benefit analysis principles
- financial delegation policy of organisation, financial control systems and requirements
- organisational business objectives and goals, including operational and business planning
- risk assessment and management principles.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • analyse costs of operating customer contact operations • prepare, justify and present the budget • control and monitor the budget and comply with financial control systems • demonstrate knowledge of budgeting principles.
Context of and specific resources for assessment	Assessment must ensure access to: • information and databases for analysis activities • relevant standards and guidelines • financial control systems, and budget documentation and reporting.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

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	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of feedback from stakeholders • review of performance against targets and budget • review of transaction cost report • review of operations budget • review of budget justification documentation • review of budget performance tracking report • oral and/or written questioning to assess knowledge of strategies to minimise threats to budget • review of communication plan.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCCO601B Optimise customer contact operations • BSBMGT618A Develop a contact centre business plan.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Transaction costs may include:	• unit cost per transaction, which may comprise:
	  • administration costs
	  • information technology costs
	  • incentive payment costs
	  • infrastructure costs
	  • staff costs
	  • support service costs
	  • telecommunications services costs.

Revenue may include:	• payments for outsourced services • payments for services provided to organisation • performance incentives • sales and marketing incentives.
Operating expenses	• information technology costs • labour costs

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may include:	• recurring costs associated with operations • rental for facilities • repair and maintenance costs • sales incentive payments • stationery • training costs • utility costs.
Capital expenditure may include:	• expenditure on depreciating assets • non-recurring costs • purchase of equipment • purchase of infrastructure.
Stakeholders may include:	• back office support areas • billing • credit and collections • executive • finance • marketing and sales • regulatory • strategy and planning • other service areas.
Statistical performance may include:	• abandoned call data • call volume and handling time data • customer satisfaction data • headcount and staffing data • occupancy and adherence data • overtime levels • sales conversion rates • sales data • service level data.
Financial control systems may include:	• enterprise-specific methods and tools for tracking and managing costs • financial delegation limits • reporting templates • system-generated reports and alerts.

Unit Sector(s)

Stakeholder relations – contact centre operations

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Custom Content Section

Not applicable.

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BSBCMM101A Apply basic communication skills

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop communication skills in the workplace. It covers gathering, conveying and receiving information, along with completing assigned written information under direct supervision. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals developing basic skills and knowledge of workplace communication in preparation for working in a broad range of settings.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify workplace communication procedures	1.1. Identify organisational communication requirements and ***workplace procedures*** with assistance from ***appropriate people*** 1.2. Identify appropriate ***lines of communication*** with supervisors and colleagues 1.3. Seek advice on the ***communication method***/***equipment*** most appropriate for the task
2. Communicate in the workplace	2.1. Use effective questioning, and active listening and speaking skills to gather and convey information 2.2. Use appropriate non-verbal behaviour at all times 2.3. Encourage, acknowledge and act upon constructive feedback
3. Draft written information	3.1. Identify relevant procedures and formats for written information 3.2. Draft and present assigned ***written information*** for approval, ensuring it is written clearly, concisely and within designated timeframes 3.3. Ensure written information meets required ***standards*** of style, format and detail 3.4. Seek assistance and/or feedback to aid communication skills development

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to identify lines of communication, to request advice, to effectively question, to follow instructions, to receive feedback, and to convey messages clearly and concisely • culturally appropriate communication skills to relate to people from diverse backgrounds and to people with diverse abilities • literacy skills to identify work requirements, to draft written information and to process basic, relevant workplace documentation • problem-solving skills to solve routine problems related to the workplace, under direct supervision.
Required knowledge
• key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as privacy laws • organisational policies, plans and procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • clear, concise and correct verbal and written communication • promptly and appropriately following instructions • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of documents relating to

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EVIDENCE GUIDE	
	workplace communication policies and procedures.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of organisational policies, plans and procedures • review of written information.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • general administrationunits.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Workplace procedures may include:	• answering telephone calls • following instructions • informal discussions • requests from colleagues • using internet and email • using voice mail • workplace procedures related to specific tasks
Appropriate people may include:	• colleagues • other staff members • supervisors, mentors, trainers or assessors

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RANGE STATEMENT	
Lines of communication may include:	• formal and informal means • verbal or written
Communication method/equipment may include:	• computer network systems • facsimile machines • personal computer equipment including hardware, keyboards, software and communication packages • telephones
Written information may include:	• electronic mail • facsimiles • general correspondence or standard/form letters and memos • handwritten and printed materials • telephone messages or general messages
Standards may include:	• organisational policies • standards set by workgroup

Unit Sector(s)

Unit sector	

Competency field

Competency field	Communication - Interpersonal Communication

Co-requisite units

Co-requisite units		

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BSBCMM201A Communicate in the workplace

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to communicate in the workplace. It includes gathering, conveying and receiving information together with completing routine written correspondence. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who perform a range of routine workplace communication tasks using a limited range of practical skills and fundamental knowledge of effective listening, questioning and non verbal communication in a defined context under direct supervision or with limited individual responsibility.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Gather, convey and receive information and ideas	1.1. Collect information to achieve work responsibilities from appropriate sources 1.2. Use method/s and/or ***equipment*** to communicate appropriate ideas and information to the audience 1.3. Use effective listening and speaking skills in ***verbal communication*** 1.4. Seek input from internal and external sources to develop and refine new ideas and approaches 1.5. Respond to instructions or enquiries promptly and in accordance with ***organisational requirements***
2. Complete workplace documentation and correspondence	2.1. Present ***written information*** and ideas in clear and concise language to ensure the intended meaning of ***correspondence*** is understood by recipient 2.2. Draft and present correspondence within designated time lines 2.3. Ensure presentation of written information meets organisational ***standards*** of style, format and accuracy 2.4. Complete workplace forms and documentation in a clear, concise and easy to read format
3. Communicate in a way that responds positively to	3.1. Value all individuals and treat them with respect, courtesy and sensitivity 3.2. Take into consideration cultural differences in all

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ELEMENT	PERFORMANCE CRITERIA
individual differences	verbal and non-verbal communication 3.3. Use communication to develop and maintain positive relationships, mutual trust and confidence 3.4. Make efforts to use basic strategies to overcome language barriers 3.5. Ensure that behaviour is consistent with legislative requirements, enterprise guidelines and/or social protocols

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to request advice, to receive feedback and to work with a team
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to identify work requirements, and to understand and process basic workplace documentation
- organisational skills to plan work priorities and arrangements
- technology skills to select and use technology appropriate to communication tasks.

Required knowledge

- key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety (OHS)
- organisational policies, plans and procedures, especially style guide
- spelling, grammar and punctuation.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • using communication methods appropriate to the audience • producing clear, concise and correct written communication • providing prompt responses to requests for information • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of workplace documents, including policies and procedures relating to communication.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of written information and ideas • demonstration of techniques • observation of presentations • review of correspondence and completed workplace forms and documentation • assessment of presentation of written information.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other generaladministration units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Communication ***equipment*** may include:	• facsimile machines • information technology components including hardware, software and communication packages • keyboard equipment including mouse, touchpad, keyboard • network systems • pens, pencils • telephones
Verbal communication may include:	• answering enquiries from clients • answering telephone calls • informal discussions • requests from colleagues • use of voice mail
Organisational requirements may include:	• access and equity principles and practice • business and performance plans • defined resource parameters • ethical standards • goals, objectives, plans, systems and processes • legal and organisational policies, guidelines and requirements • OHS policies, procedures and programs • quality and continuous improvement processes and standards • quality assurance and/or procedures manual
Written information may include:	• briefing notes • electronic mail • facsimiles • general correspondence • handwritten and printed materials • internal memos • telephone messages

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RANGE STATEMENT	
Correspondence may include:	• emails • memorandums • messages • proformas • standard/form letters
Standards may include:	• Australian Standards • legislation • organisational policies and procedures • specified work standards • standards set by workgroup

Unit Sector(s)

Unit sector	

Competency field

Competency field	Communication - Interpersonal Communication

Co-requisite units

Co-requisite units		

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BSBCMM301B Process customer complaints

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCMM301A Process customer complaints

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to handle formal and informal negative feedback and complaints from customers. Operators may exercise discretion and judgement using appropriate knowledge of products, customer service systems and organisational policies to provide technical advice and support to a team.

Application of the Unit

This unit applies to individuals who are skilled operators and apply a broad range of competencies in various customer service contexts.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Respond to complaints	1.1 Process ***customer complaints*** using ***effective communication*** according to organisational procedures established under organisational policies, legislation or codes of practice 1.2 Obtain, ***document and review reports relating to customer complaints*** 1.3 Make decisions about customer complaints, taking into account applicable legislation, organisational policies and codes 1.4 Negotiate resolution of the complaint and obtain agreement where possible 1.5 Maintain a register of complaints/disputes 1.6 Inform customer of the outcome of the investigation
2. Refer complaints	2.1 Identify complaints that require referral to other personnel or external bodies 2.2 Make ***referrals*** to appropriate personnel for follow-up in accordance with individual level of responsibility 2.3 Forward all documents and investigation reports 2.4 Follow-up appropriate personnel to gain prompt decisions
3. Exercise judgement to resolve customer service issues	3.1 Identify implications of issues for customer and organisation 3.2 Analyse, explain and negotiate appropriate options for resolution with customer 3.3 Propose viable options in accordance with appropriate legislative requirements and enterprise policies 3.4 Ensure matters for which a solution cannot be negotiated are referred to appropriate personnel

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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to identify trends and positions of products and services
- communication skills to:
  - interpret customer complaints
  - monitor and advise on customer service strategies and resolutions
- communication skills to:
  - people with diverse abilities
  - relate to people from culturally diverse backgrounds
- literacy skills to:
  - edit and proofread texts to ensure clarity of meaning and accuracy of grammar and punctuation
  - prepare general information and papers according to target audience
  - read and understand a variety of texts
- problem-solving skills to:
  - apply organisational procedures to a range of situations
  - deal with customer enquiries or complaints
  - exercise judgement in this application
- self-management skills to:
  - comply with policies and procedures
  - consistently evaluate and monitor own performance
  - seek learning opportunities.

Required knowledge

- key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety (OHS)
- importance of good communication skills and the individual's role in processing customer complaints
- organisational procedures and standards for processing complaints and recommending appropriate action.

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Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • applying judgement in the application of industry and/or organisational procedures • working with customer complaints • knowledge of organisational procedures and standards for processing complaints.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of customer complaints • examples of documents relating to customer complaints policies and procedures.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of individual's role in processing customer complaints • review of documentation outlining necessary reports relating to customer complaints • review of complaints/disputes register.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Customers may include:	• customers with routine or specific requests • internal or external customers • people from a range of social, cultural or ethnic backgrounds • people who may be unwell, drug affected or emotionally distressed • people with varying physical and mental abilities • regular and new customers.
Complaints may include:	• different types of severity, formality and sources • scenarios where external bodies such as police are required • straightforward customer dissatisfaction • level of documentation required.
Effective communication may include:	• giving customers full attention • maintaining eye contact (for face-to-face interactions), except where eye contact may be culturally inappropriate • speaking clearly and concisely • using appropriate language and tone of voice • using clear written information/communication • using appropriate non-verbal communication (body language) personal presentation (for face-to-face interactions).
Document and review reports relating to customer complaints may include:	• completing forms and written reports • using audio-visual tapes • using computer-based systems.

Referrals may include:	• external bodies:
	  • Ombudsman
	  • Independent Commission Against Corruption (ICAC)
	  • police
	• relevant superiors in the organisational hierarchy.

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Unit Sector(s)

Communication – Interpersonal Communication

Custom Content Section

Not applicable.

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BSBCMM401A Make a presentation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit covers the performance outcomes, skills and knowledge required to prepare, deliver and review a presentation to a target audience. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who may be expected to make presentations for a range of purposes, such as marketing, training, promotions, etc. They contribute well developed communication skills in presenting a range of concepts and ideas.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare a presentation	1.1. Plan and document presentation approach and intended outcomes 1.2. Choose ***presentation strategies***, ***format and delivery methods*** that match the ***characteristics*** of the target audience, location, resources and personnel needed 1.3. Select ***presentation aids***, ***materials*** and ***techniques*** that suit the format and purpose of the presentation, and will enhance audience understanding of key concepts and central ideas 1.4. Brief others involved in the presentation on their roles/responsibilities within the presentation 1.5. Select ***techniques to evaluate presentation effectiveness***
2. Deliver a presentation	2.1. Explain and discuss desired outcomes of the presentation with the target audience 2.2. Use presentation aids, materials and examples to support target audience understanding of key concepts and central ideas 2.3. Monitor non-verbal and verbal communication of participants to promote attainment of presentation outcomes 2.4. Use persuasive communication techniques to secure audience interest 2.5. Provide opportunities for participants to seek

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ELEMENT	PERFORMANCE CRITERIA
	clarification on central ideas and concepts, and adjust the presentation to meet participant needs and preferences 2.6. Summarise key concepts and ideas at strategic points to facilitate participant understanding
3. Review the presentation	3.1. Implement ***techniques to review the effectiveness*** of the presentation 3.2. Seek and discuss reactions to the presentation from participants or from key personnel involved in the presentation 3.3. Utilise feedback from the audience or from key personnel involved in the presentation to make changes to central ideas presented

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- facilitation and presentation skills to communicate central ideas of a message in an informative and engaging manner, and to utilise verbal and non-verbal techniques to sustain participant engagement
- literacy skills to prepare presentation information and to write in a range of styles for different target audiences.

Required knowledge

- data collection methods that will support review of presentations
- industry, product/service
- key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - environmental issues
  - occupational health and safety

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REQUIRED SKILLS AND KNOWLEDGE
• principles of effective communication • range of presentation aids and materials available to support presentations.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • preparation, delivery and evaluation of the effectiveness of at least two presentations related to the candidate's occupation or area of interest • knowledge of the principles of effective communication.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment, documentation and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • demonstration of preparation, delivery and evaluation of a presentation • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • review of selected presentation aids, materials and techniques • review of briefing provided for others involved in the presentation • evaluation of techniques implemented to review the effectiveness of the presentation.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Presentation strategies may involve:	• case studies • demonstration • discussion • group and/or pair work • oral presentations • questioning • simulations and role-play
Presentation format and delivery methods may include:	• advertising copy • audio • direct marketing copy • individual presentation • public relations copy • scripts • storyboards • team presentation • verbal presentation • video • visuals
Characteristics may include:	• age • cultural and language background • educational background or general knowledge • gender • language, literacy and numeracy needs

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RANGE STATEMENT	
	• physical ability • previous experience with the topic
Presentation aids and materials may include:	• computer simulations and presentations • diagrams, charts and posters • models • overhead projector • paper-based materials • video and audio recordings • whiteboard

Presentation techniques may include:	• animation
	• comparative advertising
	• live action
	• music
	• signature elements such as:
	  • slogans
	  • logotypes
	  • packaging
	• sound effects
	• use of a guest speaker
	• use of black and white
	• use of colour
	• use of humour

Techniques to evaluate presentation effectiveness may include:	• action research • critical friends • focus group interviews • one-on-one interviews with participants and other personnel involve in the presentation • written feedback provided by participants

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Communication - Interpersonal Communication

Co-requisite units

Co-requisite units		

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BSBCMM402A Implement effective communication strategies

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to select and use communication strategies appropriate to a defined job role. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who use a range of communication strategies in carrying out their work.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Receive enquiry	1.1. Establish nature of ***enquiry*** 1.2. Ensure interactions with ***person making enquiry*** are in accordance with ***organisation's standards and procedures*** and meet the person's ***needs and expectations*** 1.3. Clearly outline ***legal and other limits*** of own responsibility to person making the enquiry 1.4. Record person's details and issues
2. Identify and apply appropriate communication techniques	2.1. Use ***communication strategies*** that reflect organisational standards and procedures 2.2. Use effective ***communication techniques*** during the enquiry 2.3. Ensure confidentiality of the enquiry is respected
3. Determine action to be taken	3.1. Identify personal limitations in taking action and seek appropriate assistance from ***designated individuals*** 3.2. Respond in an ***appropriate manner*** 3.3. Involve ***other parties*** in action if appropriate 3.4. Manage expectations of person making enquiry
4. Review outcomes of communication	4.1. Follow up with person making enquiry to ensure action was effected 4.2. Seek feedback about the communication strategies

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ELEMENT	PERFORMANCE CRITERIA
	4.3. Undertake appropriate record keeping and reporting

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication skills to:
  • listen to and interpret enquiries
  • provide clear and specific information
• computer skills to:
  • access information from a range of online sources
  • keep records
  • provide reports in required format
• literacy skills to document and record details of enquiries
• research skills to:
  • locate necessary information from internal and external sources
  • identify and evaluate status of information sought
• interpersonal skills to:
  • handle and tactfully screen enquiries of a sensitive nature
  • interact with a range of culturally and linguistically diverse clients
• problem-solving skills to assess enquiries and to allocate them to appropriate sources for further information

Required knowledge

• legislation, regulations and standards relevant to job role
• organisation's policies and procedures required for the full range of tasks associated with role and responsibilities
• accepted codes of practice relevant to the workplace, including those relating to:
  • privacy and confidentiality
  • use of company property
  • duty of care
  • ethical behaviour
  • non-discriminatory practice
  • conflict of interest
  • compliance with reasonable direction

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REQUIRED SKILLS AND KNOWLEDGE
• extent of legal professional privilege

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • conduct work according to accepted codes of conduct • convey appropriate options to person making enquiry according to organisation's policies and procedures • exercise judgement and tact in decisions as to when enquiries should be transferred to a more experienced person • select appropriate communication techniques with regard to culturally and linguistically diverse clients.
Context of and specific resources for assessment	Assessment must ensure access to: • an actual workplace or simulated environment • workplace manuals and reference materials, such as company policies, procedural manuals, checklists and sample forms • appropriate technology, such as computers with relevant software and communication mediums • appropriate resources and people with expert knowledge of communication techniques appropriate to the specific workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of communication techniques • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of performance in role plays • review of documentation recording details of person making enquiry, and issues • evaluation of needs and expectations of person making enquiry

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EVIDENCE GUIDE	
	and discussion of appropriate responses • oral or written questioning to assess knowledge of scope ofown responsibilities and obligations to refer matters outside of area of responsibility.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBRES404A Research legal information using primary sources.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Enquiry may be specific or general and may include:	• complaint • liaison • seeking a meeting • seeking information • seeking referral.
Person making enquiry may include:	• client or customer • general public • government representative • internal employee • representative of another organisation • supplier.

Organisation's standards and procedures may include:	• code of conduct with respect to security, confidentiality and privacy
	• compliance framework
	• documenting activities planned and undertaken
	• procedures relating to:
	  • booking rooms and resources
	  • time recording
	• protocols relating to:
	  • accommodating specific client needs, e.g. case

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RANGE STATEMENT	
	manager, social worker or parole officer • telephone responses.
Needs and expectations may include:	• fair and equitable treatment • follow-up action • sensitivity to physical, cultural, ethnic, language and literacy requirements • specificity and accuracy of information.
Legal and other limits may include:	• extent of legal and professional privilege • industry and professional regulations • legislative and professional codes of conduct • organisational practices.
Communication strategies may include:	• discuss options • draft an email, formal letter or other written response • make a telephone call • organise a meeting • send a fax • use text messaging or other mobile telephone communication • use web-based communication and networking strategies.
Communication techniques may include:	• accommodating communication difficulties experienced by person making enquiry, such as language or literacy • actively listening • clarifying request or problem by summarising and repeating to ensure that information gathered is accurate • controlling tone of voice and body language • demonstrating sensitivity to emotional and physical state and cultural background of person making enquiry • using correct grammar and language.
Designated individuals may include:	• colleague • regulatory or government personnel • supervisor • teacher or trainer.
Appropriate manner may include:	• contacting another organisation • documenting and filing communication according to organisation's procedures • not pursuing the matter • notifying relevant department of enquiry • organising a meeting • promptly contacting person making enquiry where

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RANGE STATEMENT	

	appropriate
	• providing a written response
	• recording contact on database
	• referring person making enquiry to:
	  • appropriate government department
	  • community legal centre
	  • law firm
	  • supervisor or appropriate authority within the firm
	• relaying information verbally and, if directed by legal practitioner, forwarding information in writing to person making enquiry
	• telephoning person making enquiry after researching the appropriate information.

Other parties may include:	• barristers • clients • clients' representatives • government representatives • interpreters • lawyers for opposing party • legal aid • medical and legal consultants • police • regulatory bodies.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Communication - interpersonal communication

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Co-requisite units

Co-requisite units		

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BSBCMM501A Develop and nurture relationships

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop, nurture and maintain professional relationships with clients, customers and colleagues in order to complete work tasks and further the reputation of the organisation, and the profession or occupation. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to those requiring communication and networking skills to develop and consolidate relationships with people in a range of sectors in order to build continuing relationships and ongoing business opportunities.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop professional relationships	1.1. Conduct dealings with clients, professionals, and other third parties professionally and in accordance with the ***organisation's policies and procedures*** and ***legislative***, ***regulatory and professional codes of practice*** 1.2. Comply with ***organisation's social***, ***business and ethical standards*** to develop and maintain positive relationships 1.3. Deal with colleagues, clients and other parties in a competent manner and with regard to ***confidentiality*** 1.4. Adjust ***interpersonal styles and methods*** to the needs and situations of other parties
2. Build and maintain business networks and relationships	2.1. Develop and maintain ***business and professional networks*** and other relationships to benefit the organisation 2.2. Use business and professional networks to identify and cultivate relationships in order to promote and market the organisation 2.3. Collaborate with ***other professionals and third parties*** to expand and enhance the reputation of the organisation and to identify new and improved

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ELEMENT	PERFORMANCE CRITERIA
	business practices
3. Nurture relationships and build on referral business for the long term	3.1. Follow up ***referral business*** through ***appropriate communication channels*** to find and secure new business relationships 3.2. Identify referral needs quickly and provide information about relevant products and services 3.3. Refer information and ideas about referral business to ***designated individuals*** with a view to nurturing ongoing business relationships

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to communicate effectively verbally and in writing with a variety of people of diverse backgrounds
- interpersonal skills to demonstrate networking and relationship-building techniques
- self-management skills to set goals in terms of:
  - number of clients or customers to contact
  - developing new relationships
  - maintaining existing relationships
- technology skills to:
  - access and maintain database systems
  - use custom-made software to track contact with clients and professionals, and third-party referrals
- literacy skills to:
  - write reports and letters
  - use promotional and marketing tools and techniques

Required knowledge

- local and international economic environment and trends
- marketing and public relations tools and media
- relevant legislation and regulations
- negotiation and communication principles
- information sources to identify relevant associations, conferences and other relationship building opportunities

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • liaise, develop and secure long-standing and effective relationships • apply high level communication, negotiation, interpersonal and relationship management skills • apply knowledge of the goals, policies and procedures of the organisation • consider and adapt special needs of customers, including culture, language, race, religion, ethnic origin, socio-economic status and demographic needs.
Context of and specific resources for assessment	Assessment must ensure: • access to range of client enquiries, instructions and transactions • access to actual or simulated case studies • reference to networks, associations and other business opportunities.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge.The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of role plays.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Organisation's policies and procedures may include:	• management and supervisory practices
	• organisation's procedures relating to:
	  • chain of command
	  • code of conduct
	  • conflict of interest
	  • disputes and complaint resolution
	  • professional practice.

Legislative, ***regulatory and professional codes of practice*** may include:	• local regulations • privacy and other relevant commonwealth, state and territory legislation • professional or occupational codes of conduct relevant to job role.
Organisation's social, ***business and ethical standards*** may include:	• client management practices and principles • customer charter • organisational guidelines • professional codes of practice, in particular ethics and confidentiality.
Confidentiality may include:	• requirements under relevant legislation, such as privacy • standards described by the organisation's policies and procedures.
Interpersonal styles and methods may include:	• educate and inform • negotiate and persuade • seek input from internal and external sources and use this input to develop and refine ideas and approaches • treat people with integrity, respect and empathy • use methods appropriate to the business or organisational audience to communicate ideas and information, taking into account social and cultural diversity • use soft sell and hard sell techniques.
Business and professional networks	• award ceremonies • charity functions

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RANGE STATEMENT	
may include:	• networking events • professional associations • seminars and conferences • sports outings and special events • supplier events.
Other professionals and third parties may include:	• accounting and taxation professionals • company directors and managers • consumer protection authorities • government departments and agencies • legal professionals • licensing authorities • management and other relevant associations • professional associations • real estate professionals.
Referral business may include:	• developed networks • friends and relatives • government representatives • own organisation's internal call-in or referral method • past clients or customers • professional associations • recommendations and referrals from other professionals or organisations • recommendations from clients or customers.
Appropriate communication channels may include:	• advertisements • cold calls • community events • face-to-face • mail drops • mobile telephone based communication • newsletters • office events • phone, email and other electronic technology • seminars • web-based social networking.
Designated individual may include:	• colleague in other division or work group • recognised expert • specialist personnel • supervisor.

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Communication - interpersonal communication

Co-requisite units

Co-requisite units		

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BSBCMN311B Maintain workplace safety

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit is concerned with OHS responsibilities of employees with supervisory responsibilities to implement and monitor the organisation's Occupational Health and Safety policies, procedures and programs in a small team to meet legislative requirements. This unit has been adapted from Generic Competency B in the National Guidelines for Integrating Occupational Health and Safety Competencies into National Industry Competency Standards [NOHSC:7025 (1998) 2nd edition].

Application of the Unit

Application of the unit	Frontline managers have a key role in maintaining workplace safety within the context of the organisation. In their role, they closely monitor aspects of work associated with the safe delivery of products and services, meaning that they have an important responsibility in influencing the ongoing safety within the workplace. At this level, work will normally be carried out within known routines, methods and procedures, and may also involve a number of complex or non routine activities that require some discretion and judgement.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Assist incorporation of Occupational Health and Safety policy and procedures into the work team	1.1. Demonstrate basic requirements of ***Occupational Health and Safety legislation*** in area of responsibility appropriate for health and safety needs of a small work team 1.2. Provide information and clearly explain to the work group the ***organisation's Occupational Health and Safety policies***, ***procedures and programs*** 1.3. Regularly provide information and clearly explain to the work group information about ***identifying hazards*** and the outcomes of ***risk assessment***
2. Support participative arrangements for the management of Occupational Health and Safety	2.1. Implement and monitor ***organisational consultative procedures*** to facilitate participation of work group in management of work area hazards 2.2. Promptly dealt with issues raised through consultation in accordance with organisational

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ELEMENT	PERFORMANCE CRITERIA
	procedures for issue resolution 2.3. Encourage and assist team members to contribute to the management of Occupational Health and Safety at the workplace 2.4. Engage with individuals and teams to identify and implement improvements in the management of Occupational Health and Safety Feedback
3. Support the organisation's procedures for providing Occupational Health and Safety training	3.1. Provide advice on Occupational Health and Safety ***training needs*** of individuals and workgroup 3.2. Provide advice on strategies and opportunities for development of workgroup's competencies in relation to Occupational Health and Safety 3.3. Provide ***coaching and mentoring assistance*** to team members to support the effective development of individual and group competencies in Occupational Health and Safety
4. Participate in identifying hazards and assessing and controlling risks for the work area	4.1. Provide advice on ***hazards in work area*** in line with organisation's Occupational Health and Safety policies and procedures 4.2. Support the implementation of ***procedures to control risks*** using the hierarchy of controls and in accordance with organisational procedures 4.3. Identify and reported inadequacies in existing risk control measures are in accordance with the hierarchy of controls 4.4. Accurately complete and maintain Occupational Health and Safety records of incidents in the work area are in accordance with Occupational Health and Safety legal requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to understand workplace procedures and work instructions for identifying and reporting hazards and interpreting Occupational Health and Safety signs and symbols

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REQUIRED SKILLS AND KNOWLEDGE

• analytical skills to identify hazards and assess risks in the work area
• data analysis skills including:
  • incident (accident) monitoring
  • environmental monitoring
  • evaluation of effectiveness of risk control measures
• assessment skills to assess resources required to apply risk control measures
• technology skills including the ability to operate and shut down equipment
• coaching and mentoring skills to provide support to colleagues
  • Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities.

Required knowledge
• relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • hazards and associated risks which exist in the workplace • organisation policies and procedures relating to hazard management, fire, emergency, evacuation, incident (accident) investigating and reporting • Occupational Health and Safety management to other organisational systems and procedures • characteristics and composition of the workgroup.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • organisational management systems and procedures to Occupational Health and Safety within work group area • Occupational Health and Safety legal and organisational requirements • procedures for identifying hazards in the work area • procedures for assessing and controlling risks to health&safety associated with those hazards, in

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EVIDENCE GUIDE	
	accordance with the hierarchy of control • specific, clear and accurate information and advice on workplace hazards to work group • appropriate supervision of work group.

Context of and specific resources for assessment	Assessment must ensure:
	• access to safety processes, hazards and risk which are relevant to the area of work
	• access to relevant information and documentation on compliance requirements such as:
	  • organisational policies, standard operating procedures, procedures and plans
	  • relevant legislation, regulations, licensing requirements, codes of practice, standards
	• access to relevant internal and external data files
	• access to appropriate office equipment and resources used in the identification and rectification of OHS compliance breaches.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • review of documents on workplace OHS legislation, codes, standards, policies and procedures relevant developed and communicated to employees • analysis of responses to case studies and scenarios • demonstration of the application of OHS legislation in conducting work safely • oral or written questioning to assess knowledge of research and data collection methods to obtain evidence of compliance with OHS legislation • assessment of duty of care arrangements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Occupational Health and Safety legislation may include:	• legislation relevant to the workplace, occupation and industry, for example, mining safety, electrical legislation
	• relevant commonwealth and state/territory OHS specific acts and regulations such as:
	  • common law
	  • contract law
	  • criminal law
	  • dangerous goods
	  • environmental protection
	  • equal opportunity and anti-discrimination law
	  • industrial relations law
	  • privacy
	• workers compensation

Organisation's Occupational Health and Safety policies procedures and programs may include:	• procedures for hazard identification • procedures for risk assessment, selection and implementation of risk control measures • incident (accident) investigation • OHS audits and safety inspections • consultative arrangements for employees in work area • hazard reporting procedures • safe operating procedures/instructions • use & care of personal protective equipment • emergency & evacuation procedures • purchasing policy & procedures • plant & equipment maintenance & use • hazardous substances use and storage • dangerous goods transport & storage • OHS arrangements for on site contractors, visitors and members of public • first aid provision/medical practitioner contact

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RANGE STATEMENT	
	& attention • site access
Identifying hazards and outcomes of ***risk assessment*** may occur through activities such as:	• workplace inspections in area of responsibility • consulting work team members • housekeeping • checking equipment before and during work • review of records, eg injury, hazardous substances including labels and Materials Safety Data Sheet register, dangerous goods storage list, training, plan and equipment maintenance, etc
Training needs relating to Occupational Health and Safety may include:	• coaching, mentoring and/or supervision • formal/informal learning programs • internal/external training provision • personal study
Organisational consultative procedures may include:	• formal and informal meetings • health and safety committees • attendance of health and safety representatives at management meetings • other committees, for example, planning and purchasing • early response to employee suggestions, requests, reports and concerns put forward to management • counselling/disciplinary processes
Coaching and mentoring assistance may include:	• explaining/clarifying • respecting the contribution of all participants and giving credit for achievements • presenting and promoting a safe workplace • problem solving • providing encouragement • providing feedback to another team member
Hazards in work area may include:	• blocked exits • slippery and uneven floors • untidy and or noisy work areas • lack of adequate storage • reliance on low order control measure (eg PPE) to reduce worker risk exposure instead of controlling the hazard itself • unguarded /poorly maintained machinery and equipment

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RANGE STATEMENT	
	• unlabelled chemicals and substances • ergonomically unsuitable work stations and task design, eg. repetitive work, poor lighting/ glarey surfaces, non-adjustable work surfaces & seating • internal/external threat of occupational violence and bullying

Procedures to control risks may include actions such as:	• application of the hierarch of control, namely:
	• eliminate the risk
	• reduce/minimise the risk through:
	  • engineering controls
	  • administrative controls
	  • personal protective equipment
	• regular consultation with workers

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Frontline Management

Co-requisite units

Co-requisite units		

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BSBCOM401B Organise and monitor the operation of compliance management system

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to organise and monitor the operation of a compliance program/management system established by an organisation. It has been designed to be consistent with AS 3806:2006 Compliance programs. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of compliance who are involved in organising and operating compliance managing systems and creating solutions to unpredictable problems. Well developed skills enable these individuals to provide leadership and guidance to others, although they have limited responsibility for the output of others. Analysis and evaluation of information will take place from a variety of sources. This unit could be applied as part of a broader role of an owner-manager or senior manager in a small organisation. It may also be undertaken as a section or line manager in an operational unit or as a member of a compliance management team within a larger organisation. Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk management and AS ISO 15489:2004 Records

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	management.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify compliance roles and responsibilities	1.1. Confirm and interpret the ***compliance requirements*** applicable to the organisation 1.2. Examine the structure of the organisation to determine the roles, accountabilities and responsibilities of managers and operational staff in maintaining compliance within the organisation's

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ELEMENT	PERFORMANCE CRITERIA
	planned compliance program/management system
2. Organise the operation of the compliance program/management system	2.1. Confirm the ***components of the planned compliance program/management system*** and clarify the proposed structures, procedures and budgetary arrangements for their implementation 2.2. Develop an implementation strategy and schedule for the establishment of the planned compliance program/management system in accordance with ***relevant Australian and international standards*** 2.3. Assign or acquire ***resources for the planned compliance program/management system*** in accordance with organisational procedures and policies 2.4. Arrange appropriate briefings and training to ensure relevant managers and operations staff are aware of their roles and responsibilities 2.5. Launch the compliance program/management system in accordance with organisation's plan
3. Monitor the operation of the compliance program/management system	3.1. Gather information on the operation of the compliance program/management system from ***appropriate sources*** 3.2. Review feedback and ***performance indicators*** on the operation of the compliance program/management system in terms of agreed criteria 3.3. Identify problems in the operation of the compliance program/management system and in particular any breach of compliance requirements and take appropriate action to address problems 3.4. Provide detailed compliance requirements in the case of breaches, initiate specific timely action and inform all relevant internal and external personnel through the established reporting systems
4. Document the operation and monitoring of the compliance program/management system	4.1. Prepare and disseminate information on the operation of the compliance program/management system to ***relevant internal*** and ***external personnel*** in accordance with the ***communication strategy*** for the compliance program/management system 4.2. Prepare and disseminate periodic reports on the operation of the compliance program/management system, identify any operational problems and take any related action to relevant internal and external personnel

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ELEMENT	PERFORMANCE CRITERIA
	4.3. Prepare and disseminate reports on any identified breaches of compliance requirements and take any related action to relevant internal and external personnel

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- financial skills to manage budgetary resources for compliance management systems
- interpersonal skills to establish rapport and to build relationships with clients, team members and stakeholders who have an interest in the operation of an organisation's compliance program or management system
- leadership skills to gain trust and confidence of colleagues and clients
- literacy skills to prepare and edit reports containing complex concepts and ideas
- organisational and time management skills to organise compliance management systems, and associated finances and human resources within an organisation
- problem solving skills to create innovative solutions to problems arising from the organisation and monitoring of compliance management systems
- research and data collection skills to investigate an organisation's compliance management system
- research and data collection skills to monitor the operation of a management system.

Required knowledge

- Australian and international standards including but not limited to:
  - AS 3806:2006 Compliance programs
  - AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations
  - AS ISO 15489:2004 Records management
  - AS/NZS 4360:2004 Risk management
- compliance policies and requirements relevant to the organisation
- elements of the compliance program/management system including:
  - documentation of compliance requirements relevant to the organisation
  - specification of compliance management functions, accountabilities and responsibilities within the organisation

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REQUIRED SKILLS AND KNOWLEDGE
• compliance related management information systems • record keeping systems required for compliance management • liaison procedures with relevant internal and external personnel on compliance related matters • breach management policies and processes including identifying, classifying, investigating, rectifying and reporting breaches in compliance requirements • compliance reporting procedures • corporate induction and training processes related to compliance management • processes for the internal and external promulgation and promotion of information on compliance requirements and compliance program/management system • compliance complaints handling systems • continuous improvement processes for compliance including monitoring, evaluation and review • strategies for developing a positive compliance culture within the organisation • techniques and performance indicators for monitoring the operation of a compliance program/management system • reporting processes on compliance management including reports on breaches and rectification action • relevant organisational policies and procedures including: • compliance plans and policies in various compliance areas • organisational standards for operations and ethics.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • organising and monitoring compliance programs or management systems • knowledge of relevant Australian and international standards.
Context of and specific resources for	Assessment must ensure:

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EVIDENCE GUIDE	

assessment	• access to a compliance program or management system
	• access to relevant documentation such as:
	  • plans for the operation of the compliance program/management system
	  • organisational policies, standard operating procedures, procedures and plans
	  • relevant legislation, regulations, licensing requirements, codes of practice, standards, etc.
	• access to appropriate computer resources for online searching, data processing and analysis, and report preparation and editing.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • analysis of information gathered about the compliance management system • assessment of compliance plans, progress and monitoring reports • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observations of application of compliance management techniques • observations of interactions with team members, colleagues, regulatory authorities and clients • oral or written questioning to assess knowledge of compliance management activities • review of implementation strategy and schedule for the establishment of the planned compliance program/management system • evaluation of briefings and training to ensure staff are aware of their roles and responsibilities.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other compliance units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Compliance requirements may include:	• cross-industry, industry-specific and internal organisational compliance requirements in such areas as (examples in alphabetical groupings): • anti-discrimination (including discrimination by race, sex, disability, religion, etc.), alcohol licensing (licensing regulations covering clubs, pubs, licensed premises, etc.), aviation • bankruptcy • chemical use, child protection, construction, conveyancing/real estate, copyright, corporate governance, customs, credit • education, electricity, environmental protection, equal opportunity • financial services (including banking), fire, food hygiene, freedom of information, freight forwarding • gambling, gene technology • health, human rights • insurance, immigration, intellectual property • land management • maritime, mining • pharmaceuticals, patents, privacy • quarantine • racing, rail transport, road transport • safety (including cross-industry generic regulations as well as industry, equipment or product-specific sub-categories e.g. marine safety, rail safety, food safety, aviation safety, road safety, dangerous goods, construction safety, mine safety,

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RANGE STATEMENT	
	road safety, etc.), security, sewage, superannuation • taxation, telecommunications, tobacco, trade practices and consumer protection • water supply, workers compensation, workers rehabilitation • different types of external and internal compliance requirements including: • regulations of a state/territory, national or international regulatory authority • accreditation requirements of an institute, professional organisation or registration body • requirements for certification under statutory licensing systems • statutory standards or codes of practice • internal policies, procedures, standards or codes of practice of an organisation • industrial relations agreements and policies
Components of the planned compliance program/management system may include:	• breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements • compliance complaints handling systems • compliance related management information systems • compliance reporting procedures • continuous improvement processes for compliance including monitoring, evaluation and review • corporate induction and training processes related to compliance management • documentation of compliance requirements relevant to the organisation • liaison procedures with relevant internal and external personnel on compliance related matters • processes for the internal and external promulgation and promotion of information on compliance requirements and compliance program/management system

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RANGE STATEMENT	
	• record keeping systems required for compliance management • reporting processes on compliance management including reports on breaches and rectification action • specifications of compliance management functions, accountabilities and responsibilities within the organisation • strategies for developing a positive compliance culture within the organisation • techniques and performance indicators for monitoring the operation of a compliance program/management system
Relevant Australian and international standards may include:	• AS 3806:2006 Compliance programs • AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations • AS ISO 15489:2004 Records management • AS/NZS 4360:2004 Risk management
Resources for the planned compliance program/management system may include:	• audiovisual resources where applicable • computer hardware, software and files • facilities and physical resources • hardcopy and electronic documentation • management and operations personnel • management information system
Appropriate sources may include:	• information from advisors, consultants and others with expertise in the development, operation and maintenance of compliance program/management systems • internal personnel with expertise in the development, operation and maintenance of compliance program/management systems • publications (hardcopy and electronic) of authorities and organisations in relevant compliance areas • representatives of authorities and organisations in relevant compliance areas
Performance indicators may include:	• content of reports of breaches of compliance requirements • number and details of alleged breaches of relevant laws, codes and organisational standards

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RANGE STATEMENT	
	• number and details of complaints recorded that are related to compliance requirements and action taken • operational costs of the compliance program/management system • reported problems in the operation of the complaints management system • reports on action taken in the event of a breach in compliance requirements • results of assessments of skills and knowledge of managers and operations staff in terms of the organisation's compliance requirements, the compliance program/management system and their individual roles, accountabilities and responsibilities
Relevant internal personnel may include:	• board of directors • chief executive officer • chief executives and managers in related organisations with an interest in the compliance requirements and the compliance program/management system • compliance management team (where relevant) • compliance specialists at the management level • compliance specialists at the operational level • frontline managers • legal and business advisors and consultants with expertise and interest in compliance requirements and related management systems • representatives of professional associations and institutes relevant to the compliance requirements and the compliance program/management system • representatives of relevant authorities with an interest in the compliance requirements and the compliance program/management system • senior management team
Relevant external personnel and organisations may include:	• educational institutions and organisations • government departments • professional associations and institutes • state/territory or national licensing authorities • state/territory or national statutory standards

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RANGE STATEMENT	
	authorities • state/territory, national or international regulatory authorities
Communication strategy may include:	• attendance at relevant conferences, seminars, etc. dealing with relevant aspects of applicable compliance requirements and related compliance management • hardcopy and electronic newsletters either dedicated to compliance management issues or having a section dealing with compliance management issues • nominated internal contacts linked to an established network of external contacts in relevant regulatory authorities and other organisations with an interest in applicable compliance requirements • presentations and papers at conferences or in relevant journals covering relevant aspects of the organisation's compliance program/management system • production and distribution of external documentation requirements including press releases, published information on compliance policies and organisational initiatives for compliance management, submissions and reports to regulatory authorities and others with an interest in applicable compliance requirements • production and distribution of internal documentation requirements including overall specification of the compliance program/management system, procedures, standards, organisational structures, descriptions of staff roles and responsibilities, information on compliance program/management system components, breach management policies and procedures • subscription to and/or systematic access and review of, relevant publications and periodicals dealing with relevant aspects of applicable compliance requirements and related compliance management • website and email arrangements for communication with relevant internal and

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RANGE STATEMENT	
	external personnel

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Compliance

Co-requisite units

Co-requisite units		

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BSBCOM402B Implement processes for the management of a breach in compliance requirements

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify, classify, investigate, rectify and report breaches in compliance requirements within an organisation. The processes will be as defined within the organisation's compliance program/management system. The unit has been designed to be consistent with AS 3806: 2006 Compliance programs. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This work applies to an owner-manager required to undertake a broad role in the organisation, a senior manager in a small organisation, a section or line manager in an operational unit, or a member of a compliance management team within a larger organisation. Competence in this unit requires the demonstration of core of knowledge associated with the general processes of identifying, classifying, investigating, rectifying and reporting breaches in compliance requirements. There is also a variable knowledge set related to the specific legislative requirements, code/s of practice and internal standards, and associated breach management procedures relevant to the operations and sphere of business of the organisation and/or industry sector concerned. This unit is intended to ensure that compliance is an integral part of normal business operations. Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006

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	Customer satisfaction - Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk management and AS ISO 15489:2004 Records management.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify a breach in compliance requirements	1.1. Monitor fulfilment of ***compliance requirements*** in operations within areas of responsibility in accordance with the organisation's established

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ELEMENT	PERFORMANCE CRITERIA
	compliance program/management system
	1.2. Promptly identify, classify, and report any breaches of compliance requirements
2. Develop and implement an action plan for investigation and rectification of a breach	2.1. Investigate identified breach of compliance requirements to determine the cause in accordance with the organisation's compliance program/management system
	2.2. Develop an appropriate action plan for managing and rectifying an identified breach in accordance with the established breach management procedures and ***relevant Australian and international standards***
	2.3. Take prompt action to rectify a breach as per the plan
	2.4. Document and report action taken as required
3. Liaise with relevant internal and external personnel	3.1. Maintain appropriate liaison with all relevant ***internal personnel***, and ***external personnel and organisations*** on the nature of the breach and the action being taken
	3.2. Inform internal and external personnel of progress in rectifying the breach
	3.3. Take advice and direction from relevant internal and external personnel on the management and rectification of the breach in accordance with the organisation's compliance program/management system
	3.4. Apply effective interpersonal skills
4. Monitor the rectification of a breach	4.1. Closely monitor progress in the rectification of a breach of compliance requirements in accordance with the organisation's compliance program/management system
	4.2. Identify problem/s which may arise in breach rectification and take appropriate action to deal with the problem/s and report to appropriate personnel on its management
	4.3. Notify all relevant personnel when the identified breach has been successfully rectified
5. Document breach and subsequent rectification	5.1. Prepare and submit all required reports on identified breach and subsequent rectification action to relevant internal and external personnel
	5.2. Report systemic and recurring problems of non-compliance to those with sufficient authority to correct them

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ELEMENT	PERFORMANCE CRITERIA
	5.3. Complete records of breach, action taken and the outcomes of rectification processes and file in accordance with the organisation's compliance program/management system

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- financial skills to manage budgetary resources for compliance management systems
- interpersonal skills to establish rapport, and to build relationships with clients, team members and stakeholders who have an interest in the operation of an organisation's compliance program or management system
- leadership skills to gain the trust and confidence of colleagues and clients
- literacy skills to prepare and edit reports containing complex concepts and ideas
- organisational and time management skills to organise compliance management systems, associated finances and human resources within an organisation
- problem solving skills to create innovative solutions to problems arising from organising and monitoring compliance management systems
- research and data collection skills to investigate an organisation's compliance management system.

Required knowledge

- compliance policies and requirements applicable to the organisation
- elements of the compliance program/management system including:
  - analysis techniques relevant to the review and interpretation of an identified breach in compliance requirements
  - breach management policies and processes including identifying, classifying, investigating, rectifying and reporting breaches in compliance requirements
  - compliance related management information systems
  - compliance reporting procedures
  - compliance complaints handling systems
  - continuous improvement processes for compliance including monitoring, evaluation and review
  - documentation of compliance requirements relevant to the organisation
  - liaison procedures with relevant internal and external personnel on compliance

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REQUIRED SKILLS AND KNOWLEDGE
related matters • processes for the internal and external promulgation and promotion of information on compliance requirements and compliance program/management system • record keeping systems required for compliance management • reporting processes on compliance management including reports on breaches and rectification action • specification of compliance management functions, accountabilities and responsibilities within the organisation • strategies for developing a positive compliance culture within the organisation • relevant Australian and international standards such as: • AS 3806:2006 Compliance programs • AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations • AS ISO 15489:2004 Records management • AS/NZS 4360:2004 Risk management • internal and external personnel with an interest in compliance.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification, investigation, rectification and reporting of compliance breaches within a workplace • knowledge of compliance policies and requirements applicable to the organisation.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant information on compliance requirements such as: • organisational policies, standard operating procedures, procedures and plans • relevant legislation, regulations, licensing

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EVIDENCE GUIDE	
	requirements, codes of practice, standards • access to the relevant internal and external data files • access to appropriate computer resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • analysis of information gathered about breaches in the compliance management system • assessment of action plan developed to manage and rectify an identified breach • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observations of application of compliance management techniques used in gathering information about compliance breaches • observations of interactions with team members, colleagues, regulatory authorities and clients • oral or written questioning to assess knowledge of compliance reporting procedures • review of reports submitted on identified breach and subsequent rectification action • assessment of records of breaches and action taken.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other compliance units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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RANGE STATEMENT	

Compliance requirements may include:	• different types of external and internal compliance requirements including:
	  • regulations of a state/territory, national or international regulatory authority
	  • accreditation requirements of an institute, professional organisation or registration body
	  • requirements for certification under statutory licensing systems
	  • statutory standards or codes of practice
	  • internal policies, procedures, standards or codes of practice of an organisation
	• cross-industry, industry-specific and internal organisational compliance requirements in such areas as (examples in alphabetical groupings):
	  • anti-discrimination (including discrimination by race, sex, disability, religion, etc.), alcohol licensing (licensing regulations covering clubs, pubs, licensed premises, etc.), aviation
	  • bankruptcy
	  • chemical use, child protection, construction, conveyancing/real estate, copyright, corporate governance, customs, credit
	  • education, electricity, environmental protection, equal opportunity
	  • financial services (including banking), fire, food hygiene, freedom of information, freight forwarding
	  • gambling, gene technology
	  • health, human rights
	  • insurance, immigration, intellectual property
	  • land management
	  • maritime, mining
	  • pharmaceuticals, patents, privacy
	  • quarantine
	  • racing, rail transport, road transport
	  • safety (including cross-industry generic regulations as well as industry, equipment or product-specific sub-categories e.g. marine safety, rail safety, food safety,

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RANGE STATEMENT	
	aviation safety, road safety, dangerous goods, construction safety, mine safety, road safety, etc.), security, sewage, superannuation • taxation, telecommunications, tobacco, trade practices and consumer protection • water supply, workers compensation, workers rehabilitation
Compliance program*/ *management system may include:	• breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements • compliance complaints handling systems • compliance related management information systems • compliance reporting procedures • continuous improvement processes for compliance • corporate induction and training processes related to compliance management • documentation of compliance requirements relevant to the organisation • liaison procedures with relevant internal and external personnel on compliance related matters • processes for the internal and external promulgation and promotion of information on requirements and the compliance program/management system • record keeping systems required for compliance management • reporting processes on compliance management including reports on breaches and rectification action • specification of compliance management functions, accountabilities and responsibilities within the organisation • strategies for developing a compliance culture within the organisation • techniques and performance indicators for monitoring the operation of a compliance program/management system
Relevant Australian and	• AS 3806:2006 Compliance programs

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RANGE STATEMENT	
international standards may include:	• AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organisations • AS ISO 15489:2004 Records management • AS/NZS 4360:2004 Risk management
Internal personnel may include:	• board of directors • chief executive officer • compliance management team (where relevant) • compliance specialists at the operational level • frontline managers • senior management team
External personnel and organisations may include:	• chief executives and managers in organisations with an interest in the compliance issues being researched • educational institutions and organisations • government departments • legal and business advisors and consultants with expertise and interest in compliance requirements and related management systems • professional associations and institutes • representatives of relevant authorities in pertinent compliance areas • representatives of professional associations and institutes relevant to the organisation's operations and sphere of business • state/territory, national or international regulatory authorities • state/territory or national licensing authorities • state/territory or national statutory standards authorities

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Regulation, Licensing and Risk - Compliance

Co-requisite units

Co-requisite units		

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BSBCOM403B Provide education and training on compliance requirements and systems

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively implement and maintain an organisation's established compliance program/management system. This may include the organisation of the development and provision of appropriate internal and external learning opportunities and resources. This unit has been designed to be consistent with AS 3806: 2006 Compliance programs. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Depending on the size of the organisation, the unit could be applied to different groups of managers. In small businesses, the unit could be undertaken by owner-managers, chief executives and/or other managers. In larger organisations, the unit could be required by managers and compliance section managers, who may have specific responsibility for the planning, development and operation of induction and training components of their organisation's compliance program. This unit is intended to ensure that compliance is an integral part of normal business operations. Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk

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	management and AS ISO 15489:2004 Records management.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify the requirements for induction and ongoing training programs in	1.1. Establish ***compliance requirements*** relevant to the organisation and the associated ***compliance program***/***management system***
	1.2. Confirm and document the organisation's obligations and responsibilities in providing induction and

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ELEMENT	PERFORMANCE CRITERIA
compliance management	training activities 1.3. Identify and confirm ***individual responsibilities of personnel within the organisation to implement the organisation's compliance program/management system*** 1.4. Assess and document current competence and capacity of personnel to implement and maintain a compliance program/management system 1.5. Determine induction and training needs of personnel to achieve the required levels of competence
2. Plan internal and external compliance education and training systems	2.1. Develop compliance training objectives based on assessed training needs of personnel 2.2. Assess and compare quality and costs of external training options 2.3. Assess ability of organisation to deliver required training internally 2.4. Select and organise appropriate ***internal compliance training programs*** and/or ***external compliance training options*** to meet assessed compliance management training needs 2.5. Negotiate training options if required 2.6. Prepare and negotiate budget for internal and external compliance training with appropriate organisational personnel 2.7. Identify ***training personnel*** requirements and recruit and prepare appropriate staff
3. Organise internal and external compliance education and training systems	3.1. Organise appropriate training and assessment materials and facilities for development or acquisition (where required) 3.2. Prepare and execute implementation plans for the internal and external compliance training as approved 3.3. Negotiate and sign contract/s for required external compliance training as per organisational policies and procedures 3.4. Implement planned corporate induction and training programs
4. Evaluate and monitor the compliance education and training systems	4.1. Prepare operational plan for the monitoring and evaluation of internal and external compliance training systems and seek approval from appropriate personnel 4.2. Identify and organise staff and resources required for the monitoring and evaluation of internal and

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ELEMENT	PERFORMANCE CRITERIA
	external compliance training systems 4.3. Implement approved plans for the monitoring and evaluation of internal and external compliance training systems
5. Document the operation of the compliance education and training systems	5.1. Document plans for the development and operation of both internal and external compliance induction and training systems in accordance with organisational requirements 5.2. Prepare, process and store ***operational reports***, ***certification and training and assessment records*** 5.3. Prepare and process reports on the outcomes of monitoring and evaluation of compliance induction training systems as required

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- organisational skills to source, select and coordinate appropriate internal and external training options and activities within an organisation
- interpersonal skills to contribute to a positive culture of compliance ability to coordinate training and assessment activities within an organisation
- interpersonal skills to relate to internal and external personnel involved in compliance training
- organisational and time management skills to plan and develop appropriate internal and external training in compliance related areas, including:
  - developing internal and external training schedules
  - managing other personnel involved in the education and training activities
  - coordinating availability and use of training facilities, equipment and materials
- managerial skills to monitor and evaluate internal and external training programs in an organisation
- literacy skills to read, interpret and write a range of reports with complex concepts and processes.

Required knowledge

- internal and external training options available to match the needs of the organisation and its staff in compliance related areas

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REQUIRED SKILLS AND KNOWLEDGE

- Australian and international standards relevant to training and development in compliance management systems including:
  - AS 3806:2006 Compliance programs
  - AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations
  - AS ISO 15489:2004 Records management
  - AS/NZS 4360:2004 Risk management
- sources of information on training options relevant to the development, implementation and maintenance of compliance program/management systems
- adult education and training principles
- elements of compliance programs and related management systems including:
  - documentation of compliance requirements relevant to the organisation
  - specification of compliance management functions, accountabilities and responsibilities within the organisation
  - compliance related management information systems
  - record keeping systems required for compliance management
  - liaison procedures with relevant internal and external personnel on compliance related matters
  - breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements
  - compliance reporting procedures
  - corporate induction and training processes related to compliance management
  - processes for the internal and external promulgation and promotion of information on compliance requirements and compliance management system
  - compliance complaints handling systems
  - continuous improvement processes for compliance including monitoring, evaluation and review
  - strategies for developing a positive compliance culture within the organisation
  - techniques and performance indicators for monitoring the operation of a compliance management system
  - reporting processes on compliance management including reports on breaches and rectification action
- relevant organisational policies and procedures including:
  - compliance plans and policies in various compliance areas
  - organisational standards for operations and ethics.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • provision of education and training to relevant personnel within an organisation to enable it to fulfill its obligations and responsibilities under applicable compliance requirements • knowledge of adult education and training principles.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant information on internal and external training options in compliance related areas relevant to the organisation's needs • relevant training and assessment materials, facilities and resources • suitable internal training support staff and administrators • access to training records related to the compliance training scheme • access to appropriate computer resources for managing the organisation's compliance training scheme.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of evaluation reports from participants in training programs provided • assessment of training program materials, content, facilitator and participant guides • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observations of interactions with trainees, team members, colleagues, regulatory authorities and clients • oral or written questioning to assess knowledge of training program content or implementation

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EVIDENCE GUIDE	
	• review of implementation plans for the internal and external compliance training, and the operational plan for the monitoring and evaluation of internal and external compliance training systems • assessment of operational reports, certification and training and assessment records.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other compliance units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Compliance requirements may include:	• cross-industry, industry-specific and internal organisational compliance requirements in such areas as (examples in alphabetical groupings):
	  • anti-discrimination
	  • alcohol licensing regulations
	  • bankruptcy
	  • chemical use, child protection, construction, conveyancing/real estate, copyright, corporate governance, customs, credit
	  • education, electricity, environmental protection, equal opportunity
	  • financial services, fire, food hygiene, freedom of information, freight forwarding
	  • gambling, gene technology
	  • health, human rights
	  • insurance, immigration, intellectual property

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RANGE STATEMENT	

	• land management
	• maritime, mining
	• pharmaceuticals, patents, privacy
	• quarantine
	• racing
	• rail transport
	• road transport
	• safety
	• security
	• sewage
	• superannuation
	• taxation
	• telecommunications
	• tobacco
	• trade practices
	• consumer protection
	• water supply
	• workers compensation
	• workers rehabilitation
	• different types of external and internal compliance requirements including:
	  • regulations of state/territory, national or international regulatory authority
	  • accreditation requirements of an institute, professional organisation or registration body
	  • requirements for certification under statutory licensing systems
	  • statutory standards or codes of practice
	  • internal policies, procedures, standards or codes of practice of an organisation

Compliance program*/ *management system may include:	• documentation of compliance requirements relevant to the organisation • breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements • compliance complaints handling systems • compliance related management information systems

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RANGE STATEMENT	
	• compliance reporting procedures • corporate induction and training processes related to compliance management • continuous improvement processes for compliance including monitoring, evaluation and review • liaison procedures with relevant internal and external personnel on compliance related matters • processes for the internal and external promulgation and promotion of information on compliance requirements and compliance program/management system • record keeping systems required for compliance management • reporting processes on compliance management including reports on breaches and rectification action • specifications of compliance management responsibilities within the organisation • strategies for developing a positive compliance culture within the organisation • techniques and performance indicators for monitoring the operation of a compliance program/management system
Individual responsibilities of personnel within the organisation to implement the organisation's compliance program/management system may include:	• advising and consulting on compliance requirements and management systems • applying basic skills and knowledge (achieved in induction or orientation program) to ensure that compliance is maintained with applicable regulations, rules, codes etc. • costing and budgeting for compliance • creating a culture of compliance within an organisation • developing and implementing systems for compliance, including record keeping, complaints and reporting systems • ensuring that the organisational infrastructure, policies and operating procedures for compliance are developed, implemented and maintained • educating others on compliance requirements and related management systems

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RANGE STATEMENT	
	• ensuring compliance within others' work • ensuring compliance within own work • evaluating and reviewing compliance management system • identifying and interpreting compliance requirements implementing the compliance records system • implementing the compliance related complaints-handling system • managing rectification of breaches of compliance requirements • monitoring and reporting on the implementation of compliance systems and requirements • organising the implementation of compliance program/management system • planning and developing a compliance management system • promoting compliance within and outside of an organisation • rectifying identified breaches of compliance requirements • undertaking risk management on compliance
Internal compliance training programs may include:	• induction and on-job coaching and mentoring on compliance responsibilities and roles within compliance programs and related management systems • internal off-job training on specific aspects of compliance management system such as MIS, complaints management, breach management, contributing to a compliance culture within the organisation, etc. (these may be substantial courses or short one-day workshops on specific issues) • internally developed and managed online training on specific aspects of the compliance management system including operational procedures and relevant roles and responsibilities
External compliance training options may include:	• training programs conducted by regulatory authorities on requirements and obligations within a specific area of compliance e.g. OHS (Australian Safety and Compensation Council) or financial advisor regulations (Australian

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RANGE STATEMENT	
	Securities & Investments Commission) • training programs on relevant aspects of compliance conducted by accredited training organisations • externally developed and managed online training on specific aspects of compliance and compliance programs and related management systems
Training personnel may include:	• compliance education and training managers • training coordinators • trainers and assessors with expertise in relevant aspects of compliance requirements, compliance programs and related management systems • coaches and mentors in the workplace with expertise in relevant aspects of compliance requirements, compliance programs and related management systems • training support staff including administration staff, training resource managers and training material developers
Operational reports, ***certification and training and assessment records*** may include but are not limited to:	• accreditation submissions and related documentation • assessment outcomes • educational awards and training certificates • reports on the evaluation of compliance training programs • planning and operational documentation for both internal and external compliance training • trainee and student records

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Regulation, Licensing and Risk - Compliance

Co-requisite units

Co-requisite units		

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BSBCOM404B Promote and liaise on compliance requirements, systems and related issues

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to promote, communicate and liaise about an organisation's compliance requirements and commitments to staff, agents, contractors and other relevant third parties. This unit has been designed to be consistent with Australian Standard AS 3806: 2006 Compliance programs. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to owner-managers, chief executives or senior managers in a small business, and managers or members of a compliance management team within a larger organisation. This unit requires well developed promotional and liaison skills combined with knowledge of relevant legislative requirements, code/s of practice and internal standards and procedures to ensure that compliance is an integral part of normal business operations. This unit also applies to promotional and/or liaison activities undertaken by an internal consultant responsible for advising the chief executive and/or management team on compliance management policies and systems, and related matters. Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk

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	management and AS ISO 15489:2004 Records management.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Clarify compliance issues on which liaison is required	1.1. Confirm and clarify with relevant internal and external personnel, ***compliance issues*** requiring communication 1.2. Seek and/or obtain information during the liaison activity on applicable ***compliance requirements*** and

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ELEMENT	PERFORMANCE CRITERIA
	related ***compliance program/management system*** and summarise in an appropriate format 1.3. Identify, source and interpret sections of ***relevant Australian and international standards*** in terms of processes to be followed for promotional and liaison activities
2. Identify the target groups for promotional or liaison activities	2.1. Using appropriate means, identify groups that need to be aware of the organisation's compliance program/management system or that may need to be contacted about compliance issues 2.2. Record information on identified ***target groups*** and store in an appropriate format for use in activities to promote the compliance program/management system
3. Identify contacts for liaison	3.1. Identify suitable contacts from own network or with the assistance of relevant internal and external personnel 3.2. Apply ***search techniques*** to establish the most suitable contacts for the liaison activities, where appropriate
4. Develop an action plan for the promotional and liaison activities	4.1. Access and review details of the organisation's compliance program/management system 4.2. List internal and external persons and organisations that need to be aware of specific aspects of the compliance program/management system in ***compliance management promotional and liaison activities*** 4.3. Prepare an ***action plan*** for the compliance management promotional and liaison activities in collaboration with relevant internal and external personnel
5. Assign resources for promotional and liaison activities	5.1. Prepare to implement the planned compliance management promotional and liaison activities and negotiate a suitable budget with authorised personnel for approval 5.2. Assign or acquire physical and human resources for the execution of the planned promotional and liaison activities, in accordance with the approved action plan
6. Communicate with identified contacts	6.1. Make initial contact with identified ***internal and/or external contacts*** using appropriate ***communication techniques***

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ELEMENT	PERFORMANCE CRITERIA
	6.2. Ensure the requirements for seeking information are clearly explained and ***communicated***
	6.3. Apply effective interpersonal skills during all communication activities
	6.4. Provide accurate and clear details in written, electronic or oral form using appropriate techniques in accordance with relevant internal and external requirements
	6.5. Record details of communications conducted as part of compliance related promotional and liaison activities in an appropriate format
7. Manage promotional and liaison activities	7.1. Brief managers and personnel on their roles and responsibilities in the compliance management promotional and liaison activities
	7.2. Monitor compliance management promotional and liaison activities against objectives, established performance criteria, milestones and budget targets
	7.3. Take appropriate action to ensure promotional activities achieve the planned outcomes within project limits
8. Evaluate promotional and liaison activities	8.1. Collect data and ***performance indicators*** from appropriate sources, on the outcomes of compliance management promotional and liaison activities
	8.2. Analyse collected evaluation data in terms of planned outcomes and performance criteria
	8.3. Summarise the results of the promotional and liaison activities and document identified issues and related recommendations
9. Document promotional activities	9.1. Record, store and disseminate details of the execution of planned compliance management promotional and liaison activities in accordance with the organisation's policies and procedures
	9.2. Prepare and submit reports on the compliance management promotional and liaison activities and ensure the outcomes are relevant to internal and external personnel
	9.3. Refer recommendations on improvements to compliance management promotional and liaison activities to relevant managers for appropriate action
	9.4. Organise and incorporate information on contacts established during compliance management liaison activities in an appropriate ***listing of contacts*** for

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ELEMENT	PERFORMANCE CRITERIA
	future liaison activities

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to use media in the course of promotional and liaison activities
- interpersonal skills to contribute to the development of a positive culture of compliance within an organisation
- interpersonal skills to establish rapport and to relate to internal and external compliance stakeholders
- literacy skills to read and interpret various types of documents and to write reports containing complex concepts
- organisational and time management skills to implement promotional compliance and liaison activities
- project management skills to:
  - scope and plan promotional and liaison activities
  - manage other personnel involved in the promotional and liaison activities
  - manage a budget for promotional and liaison activities
- research and analytical skills to identify target groups for promotional and liaison activities
- technical skills to use communications technology effectively.

Required knowledge

- Australian and international standards including:
  - AS 3806:2006 Compliance programs
  - AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations
  - AS ISO 15489:2004 Records management
  - AS/NZS 4360:2004 Risk management
- compliance requirements applicable to the organisation
- elements of compliance program and related management systems including:
  - documentation of compliance requirements relevant to the organisation
  - specification of compliance management functions, accountabilities and responsibilities within the organisation

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REQUIRED SKILLS AND KNOWLEDGE
• compliance related management information systems • record keeping systems required for compliance management • liaison procedures with relevant internal and external personnel on compliance related matters • breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements • compliance reporting procedures • corporate induction and training processes related to compliance management • processes for the internal and external promulgation and promotion of information on compliance requirements and compliance program/management system • compliance complaints handling systems • continuous improvement processes for compliance including monitoring, evaluation and review • strategies for developing a positive compliance culture within the organisation • techniques and performance indicators for monitoring the operation of a compliance program/management system • internal and external personnel with an interest in an organisation's compliance program/management system • techniques suitable for liaising with others on an organisation's compliance program/management system and related issues • reporting processes on compliance program/management including reports on breaches and rectification action • relevant organisational policies and procedures including: • compliance plans and policies in various compliance areas • organisational standards for operations and ethics.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential: • successful promotion and liaison of a compliance

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EVIDENCE GUIDE	
competency in this unit	program/management system for an external organisation or internally within an organization • knowledge of compliance requirements applicable to the organisation.

Context of and specific resources for assessment	Assessment must ensure:
	• multiple examples of promotional activities and liaison activities are assessed
	• access to relevant information on the organisation's applicable compliance requirements and related management system such as:
	  • organisational policies, plans, standard operating procedures, compliance breach management procedures, etc.
	  • relevant legislation, regulations, licensing requirements, codes of practice, standards, etc.
	• access to the relevant internal and external data files
	• access to relevant internal and external personnel
	• access to appropriate computer resources for maintaining a contact database or maintaining records of promotional and liaison activities.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of evaluation reports about promotional activities • assessment of promotional materials, content, publications • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of delivery of promotional activities relating to compliance requirements and systems • observations of interactions with internal and external stakeholders while conducting promotional activities and liaising about compliance management systems and processes, • oral or written questioning to assess knowledge of promotional or liaison activities and their implementation • review of authenticated compliance promotional documents or computer files from the workplace or training environment

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EVIDENCE GUIDE	
	• review of action plan • assessment of records of communications about compliance related promotional and liaison activities.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other compliance units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Compliance issues may include:	• breach management strategies • changes in compliance requirements • costs of compliance • details of compliance requirements • interpretation of compliance requirements • personnel roles and responsibilities • possible exemptions in some areas of compliance requirements • risk management strategies

Compliance requirements may include:	• different types of external and internal compliance requirements including:
	  • accreditation requirements of an institute, professional organisation or registration body
	  • internal policies, procedures, standards or codes of practice of an organisation
	  • regulations of a state/territory, national or international regulatory authority
	  • requirements for certification under statutory licensing systems
	  • statutory standards or codes of practice

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RANGE STATEMENT	

	• cross-industry, industry-specific and internal organisational compliance requirements in such areas as (examples in alphabetical groupings):
	  • anti-discrimination (including discrimination by race, sex, disability, religion, etc.), alcohol licensing (licensing regulations covering clubs, pubs, licensed premises, etc.), aviation
	  • bankruptcy
	  • chemical use, child protection, construction, conveyancing/real estate, copyright, corporate governance, customs, credit
	  • education, electricity, environmental protection, equal opportunity
	  • financial services (including banking), fire, food hygiene, freedom of information, freight forwarding
	  • gambling, gene technology
	  • health, human rights
	  • insurance, immigration, intellectual property
	  • land management
	  • maritime, mining
	  • pharmaceuticals, patents, privacy
	  • quarantine
	  • racing, rail transport, road transport
	  • safety (including cross-industry generic regulations as well as industry, equipment or product-specific sub-categories e.g. marine safety, rail safety, food safety, aviation safety, road safety, dangerous goods, construction safety, mine safety, road safety, etc.), security, sewage, superannuation
	  • taxation, telecommunications, tobacco, trade practices and consumer protection
	  • water supply, workers compensation, workers rehabilitation

Compliance program*/*management system may	• breach management policies and processes including the identification, classification,

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RANGE STATEMENT	
include:	investigation, rectification and reporting of breaches in compliance requirements • compliance complaints handling systems • compliance related management information systems • compliance reporting procedures • continuous improvement processes for compliance including monitoring, evaluation and review • corporate induction and training processes related to compliance management • documentation of compliance requirements relevant to the organisation • liaison procedures with relevant internal and external personnel on compliance related matters • processes for the internal and external promulgation and promotion of information on compliance requirements and compliance program/management system • record keeping systems required for compliance management • reporting processes on compliance management including reports on beaches and rectification action • specification of compliance management accountabilities and responsibilities within the organisation • strategies for developing a positive compliance culture within the organisation • techniques and performance indicators for monitoring the operation of a compliance program/management system
Relevant Australian and international standards may include:	• AS 3806:2006 Compliance programs • AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations • AS ISO 15489:2004 Records management • AS/NZS 4360:2004 Risk management
Target groups may include:	• clients of the organisation • consultants and advisors to the organisation • contractors and suppliers of services and resources to the organisation

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RANGE STATEMENT	
	• internal management teams • internal operations teams and personnel • media and other organisations with a role in reporting on the organisation's compliance responsibilities and obligations, possible breaches in the requirements and the operation of the organisation's compliance program/management system • regulatory authorities and other organisations with an interest in applicable compliance requirements • staff
Search techniques may include:	• contacting relevant professional associations and other organisations that may be able to recommend possible contacts • internet search of websites of pertinent regulatory authorities, licensing bodies, organisations, etc. to identify relevant contacts • review of published information on personnel within relevant organisations such as company reports, journals and other documentation from regulators and other organisations with responsibility for overseeing that organisations fulfil compliance requirements • scan of suitable published reference materials such as business directories, corporate listings, government services and agencies, information directories, etc. to identify relevant contacts
Compliance management promotional and liaison activities may include:	• articles and papers in newsletters and journals • conferences, seminars and workshops • email communications • faxes • information promulgated via websites • interviews • letters, reports, completed forms and other types of written documentations • meetings • multimedia materials and resources • teleconferences and videoconferences • telephone discussions
Action plan may include:	• budget

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RANGE STATEMENT	
	• key performance criteria and indicators • methodology for evaluating the success of the planned compliance management promotional activities • objectives and planned outcomes • planned processes for reporting on the compliance management promotional activities • required human and physical resources • schedule of activities • time lines and key milestones
Internal and/or external contacts may include:	• board of directors • chief executive officer • chief executives and managers in organisations with an interest in the compliance issues being researched • compliance management team (where relevant) • compliance specialists at the operational level • frontline managers • legal and business advisors and consultants with expertise and interest in compliance requirements and related management systems • representatives of professional associations and institutes relevant to the organisation's operations and sphere of business • representatives of relevant authorities in pertinent compliance areas • senior management team
Communication techniques may include:	• electronic communications including telephone, fax, email, short message service (SMS), etc. • face-to-face oral communications • written communications
Requirements for seeking information may ***be communicated***:	• electronically • in writing • orally
Performance indicators may include:	• assessed increase in awareness among target groups of the compliance requirements and related compliance program/management system of the organisation • assessed increase in confidence in the ability

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RANGE STATEMENT	
	of the organisation to fulfil its obligations and responsibilities under applicable compliance requirements • confidence of representatives of relevant regulatory authorities, licensing bodies, etc. in the capacity of an organisation and its managers and staff to take appropriate action to fulfil pertinent compliance requirements, and to rectify and report on any breaches in those requirements • reduction in breaches of compliance requirements among internal and external personnel including those contracted to provide services or supplies to the organisation
Listing of contacts may include:	• electronic database of contacts • hardcopy lists of contacts including address books and contact lists

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Compliance

Co-requisite units

Co-requisite units		

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BSBCOM405A Promote compliance with legislation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to promote compliance with domestic and international legislation, both by self and others in the workplace. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of international trade who determine compliance strategies and model and encourage compliance by implementing these strategies.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Determine compliance strategies	1.1. Access current information about the range of domestic and international ***legislation*** relating to own work 1.2. Clarify ***compliance requirements*** to confirm understanding and ensure consistency of interpretation and application 1.3. Obtain advice to assist in applying relevant legislation to own work and identifying compliance requirements 1.4. Access organisation's procedures and practices to facilitate compliance with relevant legislation 1.5. Assess interface with ***other organisations***
2. Model and encourage compliance with legislative requirements	2.1. Apply organisation's procedures and practices to own work practices to meet compliance requirements 2.2. Identify areas of uncertainty in own work related to compliance requirements and take action to clarify issues 2.3. Review own work and seek feedback from others to confirm continuing compliance with legislative requirements 2.4. Evaluate own competence and address any identified gaps 2.5. Identify possible ***implications of non-compliance***

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ELEMENT	PERFORMANCE CRITERIA
	and use these to guide own work practices 2.6. Raise inadequacies in organisation's procedures and practices which may contribute to non-compliance in accordance with organisational procedures 2.7. Raise inadequacies with outside organisations' procedures and practices which may contribute to non-compliance in accordance with organisational procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to provide advice and to document policies and procedures
- leadership skills to gain trust and confidence of colleagues and clients
- learning skills to maintain knowledge of changes to compliance legislation and requirements
- problem-solving skills to address compliance issues.

Required knowledge

- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - Australian Harmonized Export Commodity Codes conditions
  - Carriage of Goods by Sea Act
  - Customs Act
  - INCOTERMS
  - trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act
  - Trade Practices Act
  - transport of dangerous goods
  - contract law
  - sales of goods legislation
  - Warsaw Convention
  - World Trade Organisation determinations

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REQUIRED SKILLS AND KNOWLEDGE
• organisational policies and procedures relating to legislation in organisation's functional area • penalties for non-compliance with legislative requirements • auditing requirements • Occupational Health and Safety (OHS) requirements applicable to own work and functional area.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying compliance requirements • developing and implementing strategies to manage compliance with appropriate legislation • documenting policies, procedures and practices developed to address compliance issues • encouraging and supporting own compliance and that of others in the workplace • knowledge of relevant conventions, treaties, agreements, guidelines, declarations, recommendations, laws and rules.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant workplace documentation and compliance measures • access to libraries or other resource collections • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace

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EVIDENCE GUIDE	
	reports of on-the-job performance by the candidate • review of own work and feedback sought from others to confirm continuing compliance with legislative requirements • analysis of responses to case studies and scenarios • oral or written questioning to assess knowledge of penalties for non-compliance with legislative requirements • evaluation of inadequacies raised about the organisation's procedures and practices in relation to compliance with legislative requirements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBINT405B Apply knowledge of import and export international conventions, laws and finance.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legislation may include:	• legislation applicable across all organisations such as OHS, equal opportunity, anti-discrimination, company law, contract law, consumer law • legislation specific to the operations of the organisation
Compliance requirements may include:	• audit schedules and cycles • Australian Customs Service Accredited Client Program for qualifying clients • checks and balances • crosschecking • policies and procedures detailing compliance requirements and processes to ensure

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RANGE STATEMENT	
	compliance • sign offs by individual/s responsible for ensuring compliance
Other organisations may include:	• agents • clients • customers • partners • suppliers
Implications of non-compliance may include:	• fines or penalties • loss of Accredited Client Program status for client • warnings • withdrawal of licences, approvals

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Compliance

Co-requisite units

Co-requisite units		

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BSBCOM406A Conduct work within a compliance framework

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to carry out work in accordance with the compliance framework applying to a particular job role, occupation or profession. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who identify statutory, legislative and regulatory requirements and relate them to individual work practices to ensure ongoing adherence to the compliance framework.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify individual compliance requirements	1.1. Identify and document ***statutory***, ***legislative and regulatory requirements*** relevant to job role, occupation or profession 1.2. Identify and document relevant ***organisational and industry requirements***
2. Interpret individual compliance requirements	2.1. Map compliance requirements against individual position description and work practices 2.2. Discuss ethical considerations with relevant parties where appropriate
3. Ensure individual compliance	3.1. Consult with ***appropriate persons*** to identify procedures to be applied, contingent on the situation 3.2. Reflect on personal actions in the context of compliance requirements 3.3. Record action taken if required
4. Identify and adapt to changes in compliance requirements	4.1. Access and analyse ***documentation*** relating to changes in compliance issues 4.2. Discuss documentation with appropriate persons to ensure ongoing compliance

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• written and oral communication to apply the relevant compliance framework
• research and documentation skills to research and summarise the compliance framework relevant to job role
• self-management skills to:
  • monitor and adapt to changes in compliance issues
  • handle contingencies

Required knowledge
• statutory, legislative and regulatory requirements relevant to job role, occupation or profession • codes of practice relevant to job role, occupation or profession • organisational policies and procedures relevant to workplace • comprehensive knowledge of individual work requirements and practices as contained in position description and occupational standards • interpretation of statutory requirements and codes of conduct in context of individual job role

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • apply knowledge of relevant statutory, legislative and regulatory requirements relating to work practices • map requirements to work practices to demonstrate an application of compliance requirements • apply work practices in accordance with a compliance framework • handle contingencies.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure access to: • legislation, regulations and codes of conduct relevant to job role, occupation or profession • information about relevant professional associations and codes of conduct • organisational policies and procedures relevant to job role, occupation or profession.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this units: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence • oral or written questioning to assess knowledge of scope of own responsibilities and obligations to refer matters outside area of responsibility • evaluation of legal cases involving the application of the compliance framework relevant to the job role, occupation or profession.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCMM402A Implement effective communication strategies.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Statutory, legislative and regulatory requirements may include:	• equal employment opportunity and anti-discrimination legislation • legislation specific to the industry or profession, e.g. Legal Professional Act 2007 • occupational health and safety laws • privacy legislation

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RANGE STATEMENT	
	• regulations and codes of conduct governing the occupation or profession.
Organisational and industry requirements may include:	• conflict of interest guidelines • equity guidelines and workplace diversity guidelines • ethical or other standards • industry standards and codes of conduct • internal control standards • organisation's values statement and relevant policies and procedures.
Appropriate person may include:	• human resource manager • person designated in organisational policy and procedure responsible for compliance • supervisor.
Documentation may include:	• newsletters • organisational records • staff meeting agendas and minutes • updates from networks and professional associations.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - compliance

Co-requisite units

Co-requisite units		

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BSBCOM501B Identify and interpret compliance requirements

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify and interpret the range of internal and external compliance requirements and obligations that must be fulfilled by an organisation. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals working as a chief executive or manager in a small organisation (where it would be part of their broad role) or as a member of a compliance management team within a larger organisation. These individuals require a sound theoretical knowledge of compliance and well established skills in identifying and interpreting compliance requirements relevant to the operations and sphere of business of the organisation and/or industry sector concerned. The unit also applies to internal or external consultants as part of a broader advisory role to the chief executive or management team of a large or small organisation on compliance management policies and systems. As the activities are focused primarily on identifying and interpreting specific legislative requirements, codes of practice, and internal standards and procedures as they relate to a particular organisation, this unit differs from BSBCOM601B Research compliance requirements and issues. Researching compliance issues is a higher order competence aimed at carrying out research into a wider range of compliance-related issues, such as the costs of compliance, the potential impact of compliance on an

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	organisation or industry, and the risks and consequences of non-compliance.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Clarify the scope of operations	1.1. Identify and review the relevant ***range of operations*** and the sphere of business arrangements of the organisation 1.2. Conduct an analysis of the operations and business arrangements of the organisation and identify the functions, products and services that may be subject

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ELEMENT	PERFORMANCE CRITERIA
	to ***compliance requirements***
	1.3. Develop and document work activity plans for determining relevant compliance requirements
	1.4. Obtain approval of plans from relevant organisational personnel
2. Identify compliance requirements	2.1. Conduct a search of ***information on internal and external compliance requirements*** using appropriate ***search resources***, including ***relevant Australian and international standards***
	2.2. Ensure the search of compliance requirements scans across all relevant ***jurisdictions of laws***, ***regulations***, ***and industry and organisational codes and standards*** and identify pertinent compliance requirements
	2.3. Progressively review information collected in terms of its relevance to the organisation's operations, services and products
	2.4. Organise and store gathered ***information on relevant compliance requirements*** in an appropriate format for further analysis
3. Interpret, analyse and prioritise identified compliance requirements	3.1. Review and interpret collected information in terms of its relevance to the organisation's functions, services and products
	3.2. Discuss and clarify with ***relevant internal or external personnel*** ambiguities, uncertainties and problems experienced in interpreting identified compliance information
	3.3. Identify, analyse and prioritise relevant compliance requirements in terms of critical implications for the organisation and risks and consequence of possible breaches
	3.4. Group pertinent compliance requirements into those that are critical and central to the organisation's operations, those that are important in some circumstances but are not central to the organisation's operations, and those that are pertinent but are incidental to the organisation's operations
4. Document compliance requirements	4.1. Organise and document outcomes of the identification and interpretation activities
	4.2. Prepare and communicate reports of relevant compliance requirements and assessment of implications to ***relevant personnel performing***

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ELEMENT	PERFORMANCE CRITERIA
	specific compliance management functions

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• interpersonal skills to:
  • contribute to the development of a positive culture of compliance within an organisation
  • work with internal and external personnel with an interest in an organisation's compliance program and management system
• interpersonal and communication skills to relate to internal and external personnel, including those representing relevant regulatory authorities, professional institutes and organisations, including standards' organisations
• literacy skills to read and interpret various types of documents and to write reports containing complex concepts
• organisational and time-management skills to conduct compliance management activities
• project management skills to:
  • scope and plan the conduct of compliance requirement identification activities
  • manage other personnel involved in the identification and interpretation of compliance management activities
• research and analytical skills to identify and interpret compliance requirements
• technical skills to use communications technology effectively

Required knowledge

• elements of compliance programs and related management systems, including:
  • documentation of compliance requirements relevant to the organisation
  • specification of compliance management functions, accountabilities and responsibilities within the organisation
  • compliance-related management information systems
  • record-keeping systems required for compliance management
  • liaison procedures with relevant internal and external personnel on compliance-related matters
  • breach management policies and processes, including the identification, classification, investigation, rectification and reporting of breaches in

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REQUIRED SKILLS AND KNOWLEDGE
compliance requirements • compliance reporting procedures • corporate induction and training processes related to compliance management • processes for the internal and external distribution and promotion of information on compliance requirements, and compliance programs and management systems • complaints handling systems • continuous improvement processes for compliance, including monitoring, evaluation and review • strategies for developing a positive compliance culture within the organisation • techniques and performance indicators for monitoring the operation of a compliance program or management system • reporting processes on compliance management, including reports on breaches and rectification action • relevant organisational policies and procedures, including: • compliance plans and policies in various compliance areas • organisational standards for operations and ethics • relevant Australian and international standards, including: • AS 3806:2006 Compliance programs • AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations • AS ISO 15489:2004 Records management • AS/NZS 4360:2004 Risk management • relevant organisational policies and procedures, including: • plans and policies in various compliance areas • organisational standards for operations and ethics

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the ability to: • document processes used to identify, analyse and interpret

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EVIDENCE GUIDE	
competency in this unit	organisational compliance requirements • apply knowledge of elements of compliance programs and related management systems.
Context of and specific resources for assessment	Assessment must ensure access to: • organisational policies and procedures, standard operating procedures, and plans • relevant published material on legislation, regulations, licensing requirements, codes of practice, standards, etc. • appropriate computer resources for online searching and review of relevant compliance requirements.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of activities undertaken to identify compliance requirements • assessment of reports identifying compliance requirements and containing analysis of the implications of those requirements on organisational objectives, processes and systems • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of interactions with internal and external stakeholders while identifying compliance requirements • oral or written questioning to assess knowledge of compliance requirements and their impact on organisational objectives, processes and systems • review of authenticated compliance promotional documents or computer files from the workplace or training environment.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work

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RANGE STATEMENT	
situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Range of operations may include:	• full range of operations of an organisation at a particular site • full range of operations of an organisation distributed across multiple sites • full range of operations of an organisation, including mobile units such as vehicles, railway trains, maritime vessels and aircraft • operations of a particular section or organisational unit.

Compliance requirements may include:	• cross-industry, industry-specific and internal organisational compliance requirements in such areas as (examples in alphabetical groupings):
	  • anti-discrimination, including discrimination by race, sex, disability, religion, etc.; alcohol licensing, including licensing regulations covering clubs, pubs, licensed premises, etc.; aviation
	  • bankruptcy
	  • chemical use, child protection, construction, conveyancing/real estate, copyright, corporate governance, customs, credit
	  • education, electricity, environmental protection, equal opportunity
	  • financial services, including banking; fire; food hygiene; freedom of information; freight forwarding
	  • gambling, gene technology
	  • health, human rights
	  • insurance, immigration, intellectual property
	  • land management
	  • maritime, mining
	  • pharmaceuticals, patents, privacy
	  • quarantine
	  • racing, rail transport, road transport
	  • safety, including cross-industry generic regulations as well as industry, equipment or product-specific subcategories, e.g. marine safety, rail safety, food safety, aviation safety, road safety, dangerous goods, construction safety, mine safety, etc.; security; sewage; superannuation
	  • taxation, telecommunications, tobacco, trade practices and consumer protection

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RANGE STATEMENT	

	• water supply, workers compensation, workers rehabilitation
	• different types of internal and external compliance requirements, including:
	  • accreditation requirements of an institute, professional organisation or registration body
	  • internal policies, procedures, standards or codes of practice of an organisation
	  • regulations of a state or territory, national or international regulatory authority
	  • requirements for certification under statutory licensing systems
	  • statutory standards or codes of practice.

Information on internal and external compliance requirements may include:	• internal policies, standard operating procedures, standards, and codes of practice • published material relevant to compliance held in either internal or external libraries • relevant legislation, regulations and licensing requirements pertinent to the organisation's operations and sphere of business.
Search resources may include:	• computer terminals linked to data sources either via the internet, internal networks, or CDs • library resources and materials, including compliance-related books, journals, manuals, standards, CDs and other multimedia resources • published information on such things as relevant legislation, regulations, licensing requirements, codes of practice and Australian standards.
Relevant Australian and international standards may include:	• AS 3806:2006 Compliance programs • AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations • AS ISO 15489:2004 Records management • AS/NZS 4360:2004 Risk management.
Jurisdictions of laws, ***regulations***, ***industry and organisational codes and standards*** may include:	• global • industry • local • national • organisational • state or territory.
Information on relevant compliance	• correspondence, emails and other written information provided by internal and external personnel contacted

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RANGE STATEMENT	
requirements may include:	during search activities • information downloadable from relevant websites • newsletters, bulletins and information sheets and other similar periodic documentation distributed by relevant regulatory authorities and standards bodies • published information on legislation, regulations, codes of practice, standards, licensing requirements, standard operating procedures, etc. • records of conversations and meetings with relevant internal and external personnel.
Relevant internal personnel may include:	• board of directors • chief executive officer • compliance management team • compliance specialists at the operational level • frontline managers • senior management team.
Relevant external personnel may include:	• legal and business advisors and consultants with expertise in compliance management • representatives of professional associations and institutes relevant to the organisation's operations and sphere of business • representatives of relevant authorities in pertinent compliance areas.
Relevant personnel performing specific compliance management functions may include:	• compliance management consultants • compliance management officers • compliance managers • legal personnel specialising in compliance management • line managers with specific compliance functions.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, licensing and risk - compliance

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Co-requisite units

Co-requisite units		

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BSBCOM502B Evaluate and review compliance

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to evaluate and review an organisation's compliance program/management system and how it is fulfilling its obligations and responsibilities under applicable compliance requirements. This unit has been designed to be consistent with AS 3806:2006 Compliance programs. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to managers with responsibility for evaluating and reporting on the operation and effectiveness of an organisation's planned compliance program/management system to ensure that compliance is an integral part of normal business operations. It also applies to individuals working as an owner-manager (where it would be part of their broad role), as a senior manager in a small organisation, as an external consultant or as a section or frontline manager in an operational unit within the organisation. In addition, it applies to members of a compliance management team or a frontline manager within a larger organisation. Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk management and AS ISO 15489:2004 Records management.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop the evaluation plan	1.1. Obtain details of the organisation's compliance policies, objectives and assessment criteria 1.2. Obtain and interpret information on current ***compliance requirements*** applicable to the organisation 1.3. Develop a suitable ***evaluation methodology*** to enable sufficiently valid and reliable outcomes for

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ELEMENT	PERFORMANCE CRITERIA
	the required research and suitable arrangements for both internal and external monitoring processes 1.4. Prepare the ***evaluation plan*** for the proposed project including the detailing of established evaluation criteria and the data to be collected 1.5. Obtain approval of plan from relevant internal and/or external personnel
2. Gather required evaluation data	2.1. Collect relevant ***evaluation data*** on how the organisation is fulfilling its compliance requirements using appropriate techniques and sources in accordance with the agreed evaluation plan 2.2. Organise, interpret and review collected data against established evaluation criteria including those specified in ***relevant Australian and international standards*** 2.3. Discuss ambiguities, uncertainties and problems experienced while interpreting collected data and address appropriately in conjunction with ***relevant internal and/or external personnel*** 2.4. Organise interpreted evaluation data for later analysis
3. Analyse the collected data	3.1. Analyse evaluation data in accordance with planned methodology 3.2. Review and discuss outcomes and findings of the analysis with relevant internal and/or external personnel
4. Determine evaluation findings and outcomes	4.1. Develop and discuss preliminary findings and any identified issues with relevant internal and/or external personnel 4.2. Undertake any additional data collection and analysis required to clarify aspects of findings, issues and related action options if necessary 4.3. Prepare recommendations for any action to improve identified deficiencies in conjunction with relevant internal and/or external personnel
5. Document and disseminate the outcomes and recommendations of the evaluation	5.1. Prepare a draft report of the outcomes, findings and recommendations of the compliance evaluation in accordance with the agreed structure and format and distribute to relevant internal and/or external personnel for comment and feedback 5.2. Edit the report based on the feedback obtained

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ELEMENT	PERFORMANCE CRITERIA
	5.3. Proofread the report in preparation for publishing 5.4. Ensure the report of outcomes, findings and recommendations of the evaluation is signed off by ***authorised personnel*** 5.5. Produce and disseminate the report to nominated internal and external personnel in accordance with agreed arrangements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- interpersonal skills to contribute to a positive culture of compliance within an organisation
- investigative skills to evaluate and review compliance
- project management skills to:
  - develop project plans
  - manage other personnel involved in the evaluation activity
  - meet project timelines
  - mange project finances
- interpersonal skills to relate to internal and external personnel and in particular those representing relevant regulatory authorities, professional institutes and organisations, standards organisations
- research and evaluation skills to:
  - conduct literature searches and internet searches
  - analyse and organise evaluation data using appropriate techniques
  - conduct various types of evaluation surveys
  - conduct quantitative data analysis using appropriate techniques
- technical skills to use communications technology effectively.

Required knowledge

- evaluation methods and techniques suitable for compliance related evaluation and review
- sources of data relevant to compliance related evaluation and review
- relevant Australian and international standards including but not limited to:
  - AS 3806:2006 Compliance programs

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REQUIRED SKILLS AND KNOWLEDGE
• AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations • AS ISO 15489:2004 Records management • AS/NZS 4360:2004 Risk management quantitative and qualitative data analysis techniques relevant to compliance related evaluation • elements of compliance program/management systems including: • documentation of compliance requirements relevant to the organisation • compliance management functions, accountabilities and responsibilities within the organisation • compliance related management information systems • record keeping systems required for compliance management • liaison procedures with relevant internal and external personnel on compliance related matters • breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements • compliance reporting procedures • corporate induction and training processes related to compliance management • processes for the internal and external promulgation and promotion of information on compliance requirements and compliance program/management system • compliance complaints handling systems • continuous improvement processes for compliance including monitoring, evaluation and review • strategies for developing a positive compliance culture within the organisation • techniques and performance indicators for monitoring the operation of a compliance program/management system • reporting processes on compliance management including reports on breaches and rectification action • relevant organisational policies and procedures including: • compliance plans and policies in various compliance areas • organisational standards for operations and ethics.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • completion of project work which comprehensively evaluates how an organisation is fulfilling its compliance requirements • knowledge of evaluation methods and techniques suitable for compliance related evaluation and review.

Context of and specific resources for assessment	Assessment must ensure:
	• access to relevant published material and such as:
	  • organisational policies, standard operating procedures, procedures and plans
	  • relevant legislation, regulations, licensing requirements, codes of practice, standards
	  • compliance evaluation reports
	• access to the relevant internal and external data files
	• access to appropriate computer resources for online searching, data processing and analysis, and report preparation and editing.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observations of activities undertaken to evaluate compliance requirements • assessment of reports evaluating the performance and effectiveness of existing compliance systems and processes • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observations of interactions with internal and external stakeholders while evaluating compliance requirements • oral or written questioning to assess knowledge of the effectiveness of compliance systems and processes and their impact on organisational objectives, processes and systems • review of evaluation plan • assessment of dissemination of the report.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other compliance units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Compliance requirements may include:	• different types of external and internal compliance requirements including:
	  • accreditation requirements of an institute, professional organisation or registration body
	  • internal policies, procedures, standards or codes of practice of an organisation
	  • regulations of a state/territory, national or international regulatory authority
	  • requirements for certification under statutory licensing systems
	  • statutory standards or codes of practice
	• cross-industry, industry-specific and internal organisational compliance requirements in such areas as (examples in alphabetical groupings):
	  • anti-discrimination (including discrimination by race, sex, disability, religion, etc.), alcohol licensing (licensing regulations covering clubs, pubs, licensed premises, etc.), aviation
	  • bankruptcy
	  • chemical use, child protection, construction, conveyancing/real estate, copyright, corporate governance, customs, credit
	  • education, electricity, environmental

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RANGE STATEMENT	
	protection, equal opportunity • financial services (including banking), fire, food hygiene, freedom of information, freight forwarding • gambling, gene technology • health, human rights • insurance, immigration, intellectual property • land management • maritime, mining • pharmaceuticals, patents, privacy • quarantine • racing, rail transport, road transport • safety (including cross-industry generic regulations as well as industry, equipment or product-specific sub-categories e.g. marine safety, rail safety, food safety, aviation safety, road safety, dangerous goods, construction safety, mine safety, road safety, etc.), security, sewage, superannuation • taxation, telecommunications, tobacco, trade practices and consumer protection • water supply, workers compensation, workers rehabilitation
Evaluation methodology may include:	• analysis of complaints recorded involving compliance requirements • analysis of feedback from clients, suppliers, internal managers and personnel • assessment of information contained in the organisation's management information system • collection of operational data • desk analysis • drafting and editing of the evaluation report • literature searches including internet searches • review of reports from relevant compliance authorities and organisations • surveys of relevant internal and external personnel including interviews, focus groups, questionnaires
Evaluation plan may include:	• details of the applicable compliance

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RANGE STATEMENT	
	requirement and related evaluation criteria • evaluation methodology • milestones • personnel required including evaluation project manager, the evaluation team and those who may be consulted during the course of the evaluation activities • resource requirements and related costs • timelines
Evaluation data may include:	• completed survey questionnaires • documentation on feedback and complaints involving compliance requirements • operational data pertinent to the fulfillment of compliance requirements • published documents including papers, standards, regulations • quantitative data collected from various sources • records of interviews, meetings or focus group workshop outcomes • records of telephone conversations • written correspondence including letters, faxes, emails
Relevant Australian and international standards may include:	• AS 3806:2006 Compliance programs • AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations • AS ISO 15489:2004 Records management • AS/NZS 4360:2004 Risk management
Relevant internal personnel may include:	• board of directors • chief executive officer • compliance management team (where relevant) • compliance specialists at the operational level • frontline managers • senior management team
Relevant external personnel may include:	• chief executive officers and managers in organisations with an interest in the compliance issues being researched • legal and business advisors and consultants with expertise and interest in compliance requirements and related management systems • representatives of professional associations and institutes relevant to the organisation's

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RANGE STATEMENT	
	operations and sphere of business • representatives of relevant authorities in pertinent compliance areas
Authorised personnel may include:	• chief executive officer or manager in an organisation • evaluation project manager • evaluation steering committee (where applicable) • nominated representative of educational institution/s or organisation/s • nominated representative of professional association/s or institute/s • nominated representative of regulatory authority

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Compliance

Co-requisite units

Co-requisite units		

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BSBCOM503B Develop processes for the management of breaches in compliance requirements

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and monitor the processes for managing identified breaches in the fulfilment of compliance requirements within an organisation. This unit has been designed to be consistent with AS 3806:2006 Compliance programs. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working as a chief executive or manager in a small organisation (where it would be part of their broad role), or as a compliance officer or senior manager within a larger organisation with responsibility for identifying, classifying, investigating, rectifying and reporting breaches in compliance requirements. Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk management and AS ISO 15489:2004 Records management.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop procedures for responding to breaches in internal and external compliance requirements	1.1. Obtain and interpret information on current ***compliance requirements*** applicable to the organisation 1.2. Review each area of compliance requirement to establish potential breaches 1.3. Develop and document appropriate procedures for identifying, classifying, investigating, rectifying and reporting breaches in compliance requirements
2. Monitor adherence to compliance requirements	2.1. Monitor and evaluate organisation operations to identify incidences of breaches in compliance requirements 2.2. Review and evaluate complaints and other ***sources of information on potential breaches in compliance requirements***

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Interrogate compliance management information system to identify any indication of breaches in compliance requirements
3. Manage the identification and rectification of breaches in compliance	3.1. Assign appropriate staff to take the required action to identify, classify, investigate and rectify breaches in compliance requirements 3.2. Ensure senior management team within the organisation is informed of all breaches in compliance requirements
4. Liaise with relevant personnel and organisations during breach management	4.1. Maintain liaison with ***relevant regulatory authorities and other organisations with an interest in compliance*** in regard to breaches in requirements and related action being taken 4.2. Take advice from ***relevant internal and external personnel*** on the management of breaches in compliance requirements and act upon this advice appropriately
5. Evaluate the response to and rectification of, breaches in compliance	5.1. Monitor action taken to manage and rectify an identified breach in compliance requirements in terms of the organisation's compliance policy 5.2. Confirm success in rectification of compliance breaches and notify relevant internal and external personnel 5.3. Recognise problems in the rectification of compliance breaches and initiate appropriate action to ensure that management of the breach is maintained 5.4. Refer reports of systemic and recurring problems of non-compliance to those with sufficient authority to correct them
6. Document and disseminate the breach management activities and outcomes	6.1. Document and report identified breaches in compliance requirements in accordance with relevant internal and external requirements 6.2. Maintain and store records of breaches in compliance requirements 6.3. Report on the action taken to rectify identified breaches in compliance requirements and the outcomes of this action 6.4. Disseminate reports on breach management to relevant internal and external personnel

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- interpersonal skills to contribute to a positive culture of compliance within an organisation
- investigative skills to gather information on how breaches in compliance requirements occurred
- organisational skills to develop and monitor processes to manage breaches in compliance requirements, including:
  - determining compliance requirements applicable to the organisation
  - sourcing information on breach management systems suitable for the organisation
  - developing a breach management system and related procedures
  - managing other personnel dealing with identified breaches in compliance requirements
  - documenting breach management procedures
  - applying investigative skills to the level required
- communication and interpersonal skills to relate to internal and external personnel and in particular those representing relevant regulatory authorities, professional institutes and organisations, standards organisations, etc.
- technical skills to use communications technology effectively.

Required knowledge

- analysis techniques relevant to the review and interpretation of an identified breach in compliance requirements
- compliance requirements applicable to the organisation
- elements of compliance program/management system including:
  - documentation of compliance requirements relevant to the organisation
  - specification of compliance management functions, accountabilities and responsibilities within the organisation
  - compliance related management information systems
  - record keeping systems required for compliance management
  - liaison procedures with relevant internal and external personnel on compliance related matters
  - breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements
  - compliance reporting procedures
  - corporate induction and training processes related to compliance management

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REQUIRED SKILLS AND KNOWLEDGE
• processes for the internal and external promulgation and promotion of information on compliance requirements and compliance program/management system • compliance complaints handling systems • continuous improvement processes for compliance including monitoring, evaluation and review • strategies for developing a positive compliance culture within the organisation • techniques and performance indicators for monitoring the operation of a compliance/program management system • internal and external personnel with an interest in compliance • organisational responsibilities for compliance • planning processes of the organisation • potential breaches in compliance requirements • relevant organisational policies and procedures including: • procedures for breaches in compliance requirements • compliance plans and policies in various compliance areas • organisational standards for operations and ethics • reporting processes on compliance management including reports on breaches and rectification action • sections of relevant Australian and international standards dealing with aspects of breach management processes and responsibilities including but not limited to: • AS 3806:2006 Compliance programs • AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations • AS ISO 15489:2004 Records management • AS/NZS 4360:2004 Risk management quantitative and qualitative data analysis techniques relevant to compliance related evaluation.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential: • development of processes for managing

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EVIDENCE GUIDE	
competency in this unit	organisational compliance breaches • knowledge of compliance requirements applicable to the organisation.

Context of and specific resources for assessment	Assessment must ensure:
	• access to relevant information on compliance requirements such as:
	  • organisational policies, standard operating procedures, procedures and plans
	  • relevant legislation, regulations, licensing requirements, codes of practice, standards
	• access to the relevant internal and external data files
	• access to relevant internal and external personnel
	• access to appropriate computer resources needed for managing the identification and rectification of breaches in compliance requirements.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observations of activities undertaken to manage breaches in compliance requirements • assessment of reports identifying breaches in compliance • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observations of interactions with internal and external stakeholders while managing breaches in compliance requirements • oral or written questioning to assess knowledge of the effectiveness of actions taken to manage compliance breaches • review of authenticated compliance breach documents or computer files from the workplace or training environment • assessment or written reports detailing action to be taken to overcome compliance breaches and to prevent their reoccurrence in the future • review and evaluation of complaints regarding potential breaches in compliance requirements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended,

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EVIDENCE GUIDE	
	for example: • other compliance units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Compliance requirements may include:	• different types of external and internal compliance requirements including:
	  • accreditation requirements of an institute, professional organisation or registration body
	  • internal policies, procedures, standards or codes of practice of an organisation
	  • regulations of a state/territory, national or international regulatory authority
	  • requirements for certification under statutory licensing systems
	  • statutory standards or codes of practice
	• cross-industry, industry-specific and internal organisational compliance requirements in such areas as (examples in alphabetical groupings):
	  • anti-discrimination (including discrimination by race, sex, disability, religion, etc.), alcohol licensing (licensing regulations covering clubs, pubs, licensed premises, etc.), aviation
	  • bankruptcy
	  • chemical use, child protection, construction, conveyancing/real estate, copyright, corporate governance, customs, credit
	  • education, electricity, environmental protection, equal opportunity
	  • financial services (including banking), fire,

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RANGE STATEMENT	
	food hygiene, freedom of information, freight forwarding • gambling, gene technology • health, human rights • insurance, immigration, intellectual property • land management • pharmaceuticals, patents, privacy • quarantine • racing, rail transport, road transport • safety (including cross-industry generic regulations as well as industry, equipment or product-specific sub-categories e.g. marine safety, rail safety, food safety, aviation safety, road safety, dangerous goods, construction safety, mine safety, road safety, etc.), security, sewage, superannuation • taxation, telecommunications, tobacco, trade practices and consumer protection • water supply, workers compensation, workers rehabilitation
Sources of information on potential breaches in compliance requirements may include:	• external reviews of organisation operations • feedback from clients, suppliers • feedback from organisation managers and operations personnel • internal audit reports • reports from regulatory authorities and other organisations with an interest in compliance
Relevant regulatory authorities and other organisations with an interest in compliance may include:	• educational institutions and organisations • government departments • internal audit managers within the organisation • professional associations and institutes • regulatory authorities
Relevant internal and external personnel may include:	• board of directors • chief executive officer • chief executives and managers in organisations with an interest in the compliance issues being researched • compliance management team (where relevant) • compliance specialists at the operational level

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RANGE STATEMENT	
	• frontline managers • legal and business advisors and consultants with expertise and interest in compliance requirements and related management systems • representatives of professional associations and institutes relevant to the organisation's operations and sphere of business • representatives of relevant authorities in pertinent compliance areas • senior management team

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Compliance

Co-requisite units

Co-requisite units		

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BSBCOM601B Research compliance requirements and issues

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to explore and investigate various aspects and issues associated with compliance requirements and a related compliance program/management system. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to the higher level research activities needed to identify and investigate critical aspects of compliance requirements and related systems. It may be focused on researching aspects and issues to do with compliance requirements and systems for a specific organisation, or aspects and issues of compliance more generally, such as across a particular industry or the national economy. The unit applies to officers in regulatory authorities or large organisations with roles and responsibilities related to identifying and investigating impacts, issues and policy implications of various aspects of compliance. It also applies to internal or external consultants who carry out research activities for clients on various aspects of compliance as a compliance researcher or member of a compliance management team (usually within a larger organisation).

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Clarify the purpose and scope of the research	1.1. Confirm and clarify the ***purpose and scope of the required compliance related research*** in collaboration with the ***client/s*** and relevant ***internal and/or external personnel*** 1.2. Document the purpose and scope of the required research in accordance with organisational and/or client requirements
2. Develop the research plan	2.1. Develop a suitable ***research methodology*** to enable sufficiently valid and reliable outcomes for the required research 2.2. Prepare the ***research plan*** for the proposed project 2.3. Obtain approval of plan from relevant internal

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ELEMENT	PERFORMANCE CRITERIA
	and/or external personnel
3. Gather required research data	3.1. Collect relevant ***research data*** using appropriate research techniques and sources in accordance with the agreed research plan 3.2. Gather and interpret from appropriate sources, information on ***relevant Australian and international standards*** pertaining to compliance requirements and related systems 3.3. Organise, interpret and review collected data in terms of its relevance to the project's purpose and objectives 3.4. Discuss ambiguities, uncertainties and problems experienced while interpreting collected data and address appropriately in conjunction with relevant internal or external personnel 3.5. Organise interpreted research data for later analysis
4. Analyse collected data	4.1. Analyse data in accordance with planned methodology 4.2. Review and discuss outcomes of the analysis with relevant internal or external personnel
5. Determine research findings and outcomes	5.1. Interpret the outcomes of the data analysis in accordance with the project objectives 5.2. Develop and discuss preliminary findings, identified issues and related recommendations with relevant internal and/or external personnel 5.3. Undertake any additional data collection and analysis required to clarify aspects of findings, issues and related action options
6. Document and disseminate research outcomes	6.1. Prepare a draft report of the research outcomes, findings and recommendations in accordance with the agreed structure and format, and distribute to relevant internal and/or external personnel for comment and feedback 6.2. Edit the report based on the feedback obtained 6.3. Proofread the report prior to publication 6.4. Ensure the outcomes, findings and recommendations in the report are signed off by ***authorised personnel*** 6.5. Produce and disseminate the report to nominated internal and/or external personnel in accordance with agreed arrangements

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- interpersonal skills to contribute to a positive culture of compliance within an organisation
- interpersonal skills to relate to internal and external personnel and in particular those representing relevant regulatory authorities, professional institutes and organisations, standards organisations
- project management skills to:
  - manage other personnel involved in the research activity
  - manage time
  - manage finances
- research skills to:
  - conduct literature and internet searches
  - assist with various types of research surveys
  - assist with the analysis and organisation of research data, including qualitative and quantitative data, using appropriate techniques
  - develop research plans.

Required knowledge

- compliance requirements relevant to the organisation research methods and techniques suitable for compliance related research projects
- elements of compliance program/management systems including:
  - specification of compliance management functions, accountabilities and responsibilities within the organisation
  - compliance related management information systems
  - record keeping systems required for compliance management
  - liaison procedures with relevant internal and external personnel on compliance related matters
  - breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements
  - compliance reporting procedures
  - corporate induction and training processes related to compliance management
  - processes for the internal and external promulgation and promotion of information on compliance requirements and compliance program/management system
  - compliance complaints handling systems
  - continuous improvement processes for compliance including monitoring,

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REQUIRED SKILLS AND KNOWLEDGE
evaluation and review • strategies for developing a positive compliance culture within the organisation • techniques and performance indicators for monitoring the operation of a compliance program/management system • reporting processes on compliance management including reports on breaches and rectification action • quantitative and qualitative data analysis techniques relevant to compliance related research • relevant Australian and international standards including but not limited to: • AS 3806:2006 Compliance programs • AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations • AS ISO 15489:2004 Records management • AS/NZS 4360:2004 Risk management quantitative and qualitative data analysis techniques relevant to compliance related evaluation • relevant organisational policies and procedures including: • compliance plans and policies in various compliance areas • organisational standards for operations and ethics • sources of data relevant to compliance related research.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • completion of projects in which key aspects or issues associated with compliance requirements or a compliance program/management system have been researched • knowledge of compliance requirements relevant to the organisation research methods and techniques suitable for compliance related research projects.
Context of and specific resources for	Assessment must ensure:

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EVIDENCE GUIDE	

assessment	• access to relevant published material such as:
	  • organisational policies, standard operating procedures, procedures and plans
	  • relevant legislation, regulations, licensing requirements, codes of practice, standards
	• access to relevant internal and external data files
	• access to appropriate computer resources for online searching, data processing and analysis, and report preparation and editing.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of techniques and data collected to identify compliance requirements • assessment of reports documenting compliance research and issue findings • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observations of activities undertaken to research compliance requirements and issues • observations of interactions with internal and external stakeholders while researching compliance requirements • oral or written questioning to assess knowledge of compliance processes used to identify compliance requirements and issues • review research plan • evaluation of process used to distribute draft report of the research outcomes, findings and recommendations for comment and feedback, and outcomes of this process.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other compliance units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Purpose and scope of the required compliance related research may include:	• costs of compliance at the organisation or wider levels
	• investigation of relevant jurisdictional aspects of compliance covering:
	  • organisational issues
	  • industry issues
	  • local issues
	  • state/territory issues
	  • national issues
	  • global issues
	• potential consequences of non-compliance at the organisation or wider levels
	• potential impacts of compliance requirements upon an organisation, an industry or an economy
	• program and system requirements for effective compliance management
	• skill requirements and organisational structures for effective compliance management

Client/s may include:	• educational institutions and organisations • enterprises • government departments • professional associations and institutes • regulatory authorities
Relevant internal and/or external personnel may include:	• board of directors • chief executive officer • chief executives and managers in organisations with an interest in the compliance issues being researched • compliance management team (where relevant) • compliance specialists at the operational level • frontline managers • legal and business advisors and consultants

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RANGE STATEMENT	
	with expertise and interest in compliance requirements and related management systems • representatives of professional associations and institutes relevant to the organisation's operations and sphere of business • representatives of relevant authorities in pertinent compliance areas • senior management team
Research methodology may include:	• desk analysis • environmental scans • literature searches including internet searches • qualitative data analysis • quantitative data analysis using manual and computerised techniques • surveys including interviews, focus groups, questionnaires
Research plan may include:	• costs • details of the research objectives and deliverables • methodology • personnel required including project manager, researcher or research team and those who may be consulted during the course of the research activities • time lines and milestones
Research data may include:	• completed survey questionnaires • document files downloaded from internet websites • published documents including papers, standards, regulations • quantitative data collected from various sources, such as ABS data, data provided by regulatory authorities, demographic data • records of interviews, meetings or focus group workshop outcomes • records of telephone conversations • written correspondence including letters, faxes, emails
Relevant Australian and international standards may include:	• AS 3806:2006 Compliance programs • AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations

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RANGE STATEMENT	
	• AS ISO 15489:2004 Records management • AS/NZS 4360:2004 Risk management quantitative and qualitative data analysis techniques relevant to compliance related evaluation
Authorised personnel may include but are not limited to:	• chief executive officer or manager in an organisation • nominated representative of educational institution/s or organisation/s • nominated representative of professional association/s or institute/s • nominated representative of a regulatory authority • project manager • project steering committee

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Compliance

Co-requisite units

Co-requisite units		

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BSBCOM602B Develop and create compliance requirements

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and create compliance requirements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to managers and internal or external consultants of an organisation responsible for the development and creation of internal compliance requirements for the organisation, including standards, codes of practice, procedures and policies. It also applies to managers and officers in regulatory authorities, licensing authorities, statutory standards authorities, professional associations and institutes, government departments or other organisations with responsibility for establishing compliance requirements to be fulfilled by other organisations and personnel. Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations, AS/NZS 4360:2004 Risk management and AS ISO 15489:2004 Records management.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Clarify the purpose and scope of the proposed compliance requirements	1.1. Determine the ***authority for the compliance requirements*** in conjunction with relevant personnel 1.2. Clarify the purpose of the compliance requirements with relevant ***authorised personnel*** 1.3. Determine the scope of the proposed compliance requirements in consultation with relevant internal and/or external personnel 1.4. Clarify the implications of non-compliance with the proposed compliance requirements and evaluate in consultation with relevant internal and/or external

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ELEMENT	PERFORMANCE CRITERIA
	personnel 1.5. Identify and interpret ***relevant Australian and international standards*** pertaining to the proposed compliance requirements and related compliance program/management system
2. Prepare the development plan	2.1. Establish a suitable ***project methodology*** to identify and consult with relevant stakeholders who have an interest in the proposed compliance requirements 2.2. Prepare the ***plan*** for the proposed project to develop compliance requirements 2.3. Obtain approval of plan from relevant internal and/or external personnel
3. Consult with relevant stakeholders	3.1. Identify ***relevant internal and/or external stakeholders*** in the compliance requirements 3.2. Consult stakeholders on compliance requirements in accordance with the established methodology 3.3. Interpret, analyse and organise outcomes of consultations with stakeholders 3.4. Summarise findings and issues determined through the consultation process and draft appropriate recommendations on compliance requirements
4. Prepare the initial draft report on the proposed compliance requirements	4.1. Prepare the initial draft report on the proposed compliance requirements including information on the findings, issues and recommended requirements identified through the consultation processes 4.2. Submit draft report to the ***development team*** for consideration and make any changes required in preparation for validation consultations
5. Obtain feedback on draft compliance requirements	5.1. Determine an appropriate sample of stakeholders for the validation process in collaboration with the other members of the development team in accordance with the established methodology 5.2. Disseminate the draft compliance requirements to the identified sample of stakeholders using appropriate techniques and technology 5.3. Collate, interpret and analyse feedback received on the draft compliance requirements 5.4. Summarise and organise outcomes of the feedback process in preparation for editing of the draft compliance requirements
6. Edit and document recommended	6.1. Edit the draft compliance requirements appropriately

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ELEMENT	PERFORMANCE CRITERIA
compliance requirements	based on the feedback obtained from stakeholders 6.2. Format and proofread the edited compliance requirements in accordance with the agreed methodology 6.3. Submit the recommended compliance requirements in the required format to authorised personnel for consideration and due process for approval and implementation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- interpersonal skills to relate to internal and external personnel with an interest in the compliance requirements being developed
- project management skills to:
  - develop project plans
  - manage other personnel involved in the project activity
  - manage time
  - manage finances
- literacy skills to write reports containing complex concepts
- research skills to:
  - conduct literature and internet searches
  - assist with surveys to obtain input and feedback on compliance requirements
  - assist with the analysis and organisation of collected information and feedback on compliance requirements, using appropriate data collection techniques.

Required knowledge

- compliance requirements relevant to the organisation
- methods and techniques suitable for projects aimed at the development and creation of compliance requirements either as part of broader regulations, license requirements, etc. or internal standards, codes of practice, procedures and policies
- elements of compliance program/management systems including:
  - documentation of compliance requirements relevant to the organisation
  - specification of compliance management functions, accountabilities and responsibilities within the organisation

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REQUIRED SKILLS AND KNOWLEDGE
• compliance related management information systems • record keeping systems required for compliance management • liaison procedures with relevant internal and external personnel on compliance related matters • breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements • compliance reporting procedures • corporate induction and training processes related to compliance management • processes for the internal and external promulgation and promotion of information on compliance requirements and compliance program/management system • compliance complaints handling systems • continuous improvement processes for compliance including monitoring, evaluation and review • strategies for developing a positive compliance culture within the organisation • techniques and performance indicators for monitoring the operation of a compliance program/management system • reporting processes on compliance management including reports on breaches and rectification action • relevant Australian and international standards including but not limited to: • AS 3806:2006 Compliance programs • AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations • AS ISO 15489:2004 Records management • AS/NZS 4360:2004 Risk management quantitative and qualitative data analysis techniques relevant to compliance related evaluation • relevant organisational policies and procedures including: • compliance plans and policies in various compliance areas • organisational standards for operations and ethics • sources of data relevant to compliance requirements.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • completion of project activity in which compliance requirements are developed and validated • knowledge of compliance requirements relevant to the organisation.

Context of and specific resources for assessment	Assessment must ensure:
	• access to relevant published material such as:
	  • organisational policies, standard operating procedures, procedures and plans
	  • relevant legislation, regulations, licensing requirements, codes of practice, standards
	• access to relevant internal and external data files
	• access to appropriate computer resources for online searching, data processing and analysis, and document preparation and editing.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of techniques and data collected to develop and create compliance requirements • assessment of reports documenting compliance requirements in the organisation • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observations of activities undertaken to develop and create compliance systems and processes • observations of interactions with internal and external stakeholders while developing and creating compliance requirements • oral or written questioning to assess knowledge of methods and rationales for developing compliance systems and processes • review of development plan • evaluation of outcomes of consultations with stakeholders • assessment of findings, issues and recommendations on compliance requirements.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other compliance units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Authority for the compliance requirements may include:	• internal authorities (to an organisation) such as:
	  • chief executive officer or senior managers
	  • compliance manager
	  • internal audit manager
	  • quality control manager
	• external authorities such as:
	  • educational institutions and organisations
	  • government departments
	  • professional associations and institutes
	  • state/territory or national licensing authorities
	  • state/territory or national statutory standards authorities
	  • state/territory, national or international regulatory authorities

Compliance requirements may include:	• different types of external and internal compliance requirements including:
	  • accreditation requirements of an institute, professional organisation or registration body
	  • internal policies, procedures, standards or codes of practice of an organisation
	  • regulations of a state/territory, national or international regulatory authority

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RANGE STATEMENT	
	• requirements for certification under statutory licensing systems • statutory standards or codes of practice • cross-industry, industry-specific and internal organisational compliance requirements in such areas as (examples in alphabetical groupings): • anti-discrimination (including discrimination by race, sex, disability, religion, etc.), alcohol licensing (licensing regulations covering clubs, pubs, licensed premises, etc.), aviation • bankruptcy • chemical use, child protection, construction, conveyancing/real estate, copyright, corporate governance, customs, credit • education, electricity, environmental protection, equal opportunity • financial services (including banking), fire, food hygiene, freedom of information, freight forwarding • gambling, gene technology • health, human rights • insurance, immigration, intellectual property • land management • maritime, mining • pharmaceuticals, patents, privacy • quarantine • racing, rail transport, road transport • safety (including cross-industry generic regulations as well as industry, equipment or product-specific sub-categories e.g. marine safety, rail safety, food safety, aviation safety, road safety, dangerous goods, construction safety, mine safety, road safety, etc.), security, sewage, superannuation • taxation, telecommunications, tobacco, trade practices and consumer protection • water supply, workers compensation, workers rehabilitation
Authorised personnel may	• chief executive officer or manager in an

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RANGE STATEMENT	
include:	organisation • nominated representative of educational institution/s or organisation/s • nominated representative of professional association/s or institutes/s • nominated representative of a regulatory authority • nominated representative of a statutory standards authority • project manager • project steering committee
Relevant Australian and international standards may include:	• AS 3806:2006 Compliance programs • AS ISO 10002:2006 Customer satisfaction - Guidelines for complaints handling in organizations • AS ISO 15489:2004 Records management • AS/NZS 4360:2004 Risk management quantitative and qualitative data analysis techniques relevant to compliance related evaluation
Project methodology may include:	• desk analysis • environmental scans • interviews, focus groups, questionnaires • literature searches including internet searches • validation interviews, workshops, surveys
Plan may include:	• costs • details of the objectives and deliverables • methodology • personnel required including project manager, internal or external consultant or project team and those who may be consulted during the course of the project activities • time lines and milestones
Relevant internal and/or external stakeholders may include:	• board of directors • chief executive officer • chief executives and managers in organisations with an interest in the compliance requirements being developed • compliance management team (where relevant) • compliance specialists at the management level • compliance specialists at the operational level

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RANGE STATEMENT	
	• frontline managers • legal and business advisors and consultants with expertise and interest in compliance requirements and related management systems • representatives of professional associations and institutes relevant to the compliance requirements being developed • representatives of relevant authorities with an interest in the compliance requirements • senior management team
Development team may include:	• internal and external consultants and advisors • project manager • reference panel/s • steering or advisory committee • team members

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Compliance

Co-requisite units

Co-requisite units		

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BSBCOM603C Plan and establish compliance management systems

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required knowledge updated to incorporate current Australian Standards. Replaces BSBCOM603B Plan and establish compliance management systems

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to plan and establish appropriate compliance program/management systems which enable an organisation to fulfil its obligations and responsibilities under applicable compliance requirements.

The unit has been designed to be consistent with AS 3806:2006 Compliance programs.

Application of the Unit

This unit applies to a chief executive officer or senior manager in a small business, and to a senior manager and compliance section manager in larger organisations, who have specific responsibility for the planning, development and operation of a compliance program/management system.

Application of this unit must be consistent with the pertinent sections of relevant Australian and international standards and legislative requirements including: AS 3806:2006 Compliance programs, AS ISO 10002:2006 Customer satisfaction – Guidelines for complaints handling in organizations, AS/NZS ISO 31000:2009 Risk Management - Principles and Guidelines and AS ISO 15489:2004 Records management.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

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Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Determine applicable compliance requirements	1.1 Obtain and interpret information on current ***compliance requirements*** applicable to the organisation 1.2 Review each compliance requirement in terms of the relevant internal and external authorities, the risks involved, ways of ensuring compliance, the penalties for a breach of compliance, and the areas and operations of the organisation most affected
2. Identify and select an appropriate compliance program/management system	2.1 Investigate each area of applicable compliance to determine available options for a ***compliance program/management system*** that would be consistent with ***relevant Australian and International standards*** 2.2 Review and compare the options for a suitable compliance program/management system and its various components on the basis of ***established criteria*** 2.3 Select an appropriate compliance program/management system for implementation
3. Plan required compliance program/management system	3.1 Determine and document components for the proposed compliance program/management system 3.2 Determine ***personnel requirements*** for the operation of the compliance program/management system and assign or recruit appropriate staff

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	3.3 Identify ***training requirements*** for the implementation of the proposed compliance program/management system and select suitable training options 3.4 Identify and document management information systems requirements for effective and efficient operation of the compliance program/management system 3.5 Select a complaints management system suitable for the organisation and its compliance responsibilities 3.6 Determine a strategy for developing a compliance management culture in collaboration with relevant internal and external personnel 3.7. Identify and document suitable processes and procedures for identifying and managing breaches in compliance requirements 3.8 Determine reporting requirements in the various areas of compliance and develop suitable processes and procedures to meet these requirements 3.9 Ensure identified resources including human resources required for developing, implementing, reviewing and maintaining the proposed compliance program/management system are budgeted and assigned
4. Document required compliance program/management system	4.1 Document the specifications for the various components of the proposed compliance program/management system in accordance with organisational procedures and any relevant statutory requirements 4.2 Document an ***action schedule*** for implementing, reviewing and maintaining the planned compliance program/management system and disseminate to relevant internal and external personnel 4.3 Seek approval from appropriate internal and external personnel or authorities prior to establishing the proposed compliance program/management system
5. Establish the planned compliance program/management system	5.1 Appoint and train assigned managers and operations personnel if required, before they assume their compliance management responsibilities 5.2 Establish the components of the compliance program/management system in collaboration with assigned staff 5.3 Monitor operation of the compliance program/management system in collaboration with assigned staff as per the approved plan 5.4 Conduct periodic reviews of the compliance program/management system in collaboration with assigned staff as per the approved plan

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	5.5 Prepare reports on the operation and review of the compliance program/management system in accordance with established procedures and any statutory or other compliance obligations

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- contribute to a positive culture of compliance within an organisation
- research skills to:
  - conduct literature and internet searches
  - assist with various types of research surveys
  - assist with the analysis and organisation of research data, including qualitative and quantitative data, using appropriate techniques
- research management skills to:
  - develop research plans
  - manage other personnel involved in the research activity
  - manage time
  - manage finances
- interpersonal skills to relate to internal and external personnel and in particular those representing relevant regulatory authorities, professional institutes and organisations, standards organisations, etc.
- literacy skills to write reports containing complex concepts.

Required knowledge

- research methods and techniques suitable for conducting compliance related research projects
- quantitative and qualitative data analysis techniques relevant to compliance related research
- relevant Australian and international standards such as:
  - AS 3806:2006 Compliance programs
  - AS ISO 10002:2006 Customer satisfaction – Guidelines for complaints handling in organizations
  - AS ISO 15489:2004 Records management
  - AS/NZS ISO 31000:2009 Risk Management - Principles and Guidelines
- elements of compliance program/management systems including:
  - documentation of compliance requirements relevant to the organisation

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- specification of compliance management functions, accountabilities and responsibilities within the organisation
- compliance related management information systems
- record keeping systems required for compliance management
- liaison procedures with relevant internal and external personnel on compliance related matters
- breach management policies and processes including the identification, classification, investigation, rectification and reporting of breaches in compliance requirements
- compliance reporting procedures
- corporate induction and training processes related to compliance management
- processes for the internal and external promulgation and promotion of information on compliance requirements and a compliance program management system
- compliance complaints handling systems
- continuous improvement processes for compliance including monitoring, evaluation and review
- strategies for developing a positive compliance culture within the organisation
- techniques and performance indicators for monitoring the operation of a compliance program/management system
- reporting processes on compliance management including reports on breaches and rectification action

- relevant organisational policies and procedures including:
  - compliance plans and policies in various compliance areas
  - organisational standards for operations and ethics.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • planning for and setting up a compliance program/management system for an actual workplace or a simulated workplace in collaboration with relevant personnel • knowledge of research methods and techniques suitable for conducting compliance related research projects.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant information on compliance

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	requirements • access to relevant information on options for compliance program/management systems • access to the relevant internal and external personnel • access to appropriate computer resources for online searching, data processing and analysis, and report preparation and editing.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of techniques and data collected to plan and establish compliance management systems • assessment of reports documenting the development and progress of compliance management systems • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observations of activities undertaken to develop and create compliance systems and processes • observations of interactions with internal and external stakeholders while developing and creating compliance management systems • oral or written questioning to assess knowledge of methods and rationales for developing compliance systems and processes • review of documented action schedule • periodic reviews of the compliance program/management system • assessment of reports on the operation and review of the compliance program/management system.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other compliance units.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Compliance requirements may include:	• different types of external and internal compliance requirements including:
	  • accreditation requirements of an institute, professional organisation or registration body
	  • internal policies, procedures, standards or codes of practice of an organisation
	  • regulations of a state/territory, national or international regulatory authority
	  • requirements for certification under statutory licensing systems
	  • statutory standards or codes of practice
	• cross-industry, industry-specific and internal organisational compliance requirements in such areas as (examples in alphabetical groupings):
	  • anti-discrimination (including discrimination by race, sex, disability, religion, etc.), alcohol licensing (licensing regulations covering clubs, pubs, licensed premises, etc.), aviation
	  • bankruptcy
	  • chemical use, child protection, construction, conveyancing/real estate, copyright, corporate governance, customs, credit
	  • education, electricity, environmental protection, equal opportunity
	  • financial services (including banking), fire, food hygiene, freedom of information, freight forwarding
	  • gambling, gene technology
	  • health, human rights
	  • insurance, immigration, intellectual property
	  • land management
	  • maritime, mining
	  • pharmaceuticals, patents, privacy
	  • quarantine
	  • racing, rail transport, road transport

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	• safety (including cross-industry generic regulations as well as industry, equipment or product-specific sub-categories e.g. marine safety, rail safety, food safety, aviation safety, road safety, dangerous goods, construction safety, mine safety, road safety, etc.), security, sewage, superannuation • taxation, telecommunications, tobacco, trade practices and consumer protection • water supply, workers compensation, workers rehabilitation.
Compliance program/management system may include:	• breach management processes • compliance complaints handling systems • compliance related management information systems • compliance reporting procedures • continuous improvement processes for compliance including monitoring, evaluation and review • corporate induction and training processes related to compliance management • documentation of compliance requirements relevant to the organisation • liaison procedures with relevant internal and external personnel on compliance related matters • processes for the internal and external promulgation and promotion of information on compliance requirements and the compliance program/management system • record keeping systems required for compliance management • reporting processes on compliance management including reports on beaches and rectification action • specification of compliance management accountabilities/responsibilities in the organisation • strategies for developing a positive compliance culture within the organisation • techniques and performance indicators for monitoring the operation of the compliance program/management system.
Relevant Australian and international standards may include:	• AS 3806:2006 Compliance programs • AS ISO 10002:2006 Customer satisfaction – Guidelines for complaints handling in organizations • AS ISO 15489:2004 Records management • AS/NZS ISO 31000:2009 Risk Management - Principles and Guidelines.
Established criteria may include:	• cost • effectiveness • efficiency

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	• feasibility • match to organisational culture.
Personnel requirements may include:	• compliance management team (where relevant) • compliance manager • compliance officer • compliance specialists at the operational level • frontline managers and team leaders with compliance management responsibilities • internal or external consultants and advisors with expertise in compliance requirements and management systems • MIS specialists and managers with expertise in compliance requirements and management systems • senior managers with compliance management responsibilities • trainers with expertise in compliance requirements and management systems.
Training requirements may include:	• customised in-house off-the-job training and assessment programs for both operational and management staff • customised training programs delivered by external training organisations for both operational and management staff • external training programs in skill/knowledge areas relevant to the operation of compliance program/management systems • internal and external training programs aimed at strengthening the compliance management culture of the organisation • online training and assessment for both operation and management staff • on-the-job coaching and mentoring.
Action schedule may include:	• budgets for implementation, review and maintenance • internal and external reporting requirements and dates for implementation, review and maintenance • key responsibilities and activities for implementation, review and maintenance • resource acquisition and maintenance schedules • staff assignments including recruitment and training schedules • target outcomes, time lines and milestones.

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Unit Sector(s)

Regulation, Licensing and Risk – Compliance

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BSBCON401A Work effectively in a business continuity context

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to work effectively in a business continuity context. This unit requires an awareness of the organisation's overall business continuity management framework and participation in activities related to the business continuity management framework. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit is for individuals working in administrative and/or support roles who require a basic knowledge of the processes relating to the organisation's business continuity requirements. Business continuity awareness and planning help the organisation to identify barriers and/or interruptions and to determine how the organisation will achieve critical business objectives (even at diminished capacity) until full functionality is restored.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Demonstrate an understanding of the business continuity management framework	1.1. Access the business continuity management framework, and related policies and procedures 1.2. Analyse the key elements of the business continuity management framework within the ***organisation*** to determine their impact 1.3. Within work role authority, contribute to the review of the business continuity management framework, policies and procedures 1.4. Participate in emergency response and business continuity management framework training and ***exercises*** as required
2. Support the organisation's	2.1. Demonstrate an awareness of internal and external

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ELEMENT	PERFORMANCE CRITERIA
business continuity strategies	***risk*** context relevant to the organisation 2.2. Review and provide feedback on the outcomes of the ***business impact assessment/s*** 2.3. Participate in ***risk treatment*** reviews 2.4. Identify and record the organisation's ***emergency response***, ***continuity and recovery strategies*** 2.5. Identify own role and responsibility within the organisation's ***business continuity plan/s*** 2.6. Identify and report to management on any new or ***emerging risk*** or ***incident***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and teamwork skills to:
  - provide feedback to appropriate personnel about the business continuity management framework and strategies
  - read, write and understand a variety of workplace documents
  - work effectively with diverse individuals and groups
- learning skills to participate in training activities and to improve own knowledge and skills about business continuity management
- planning and organising skills to identify risk factors and to take action to minimise risk according to level of responsibility
- problem-solving skills to appropriately address identified risks treatments (within ownlevel of responsibility)
- research and data collection skills to monitor and evaluate risks
- technology skills to use the organisation's data and information management systems

Required knowledge

- Australian/New Zealand Standard AS/NZS 4360:2004Risk Management
- Australian/New ZealandStandard HandbookAS/NZS HB221:2004 Business Continuity Management
- organisation's policies and procedures, including business continuity strategies
- overall operations of the organisation, including existing data and information systems

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REQUIRED SKILLS AND KNOWLEDGE
• relevant legislation and regulations that impact on business continuity, such as OHS, environment, duty of care, contract, company, freedom of information, industrial relations, privacy and confidentiality, due diligence, records management

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated understanding of own role in relation to wider business continuity requirements in the organisation • demonstrated understanding of risk and the business continuity management framework processes and policies as they apply in the organisation • participation in contributing to improving business continuity management framework processes within the organisation
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation relating to risk management • access to business continuity management framework, business impact assessments and strategies
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the participant • review of documentation outlining risk context and organisation's processes and outcomes • work based projects or case studies • scenarios • oral or written questioning to assess basic knowledge of Australian standards for risk management and

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EVIDENCE GUIDE	
	business continuity
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Organisation may include:	• commercial enterprises • community • government • non-commercial enterprises • not-for-profit • religious organisations
Exercises may include:	• drills • scenario planning
Risk may include:	• aeronautical • armed hold-up • biological • chemical • civil disturbance • disability/death of key person • economic • electronic • erosion • explosion • fire • fraud • hazardous materials • industrial accident • infrastructure failure • market failure

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RANGE STATEMENT	
	• natural disaster • operational collapse - insolvency • pandemic • pollution • privacy and confidentiality • radiological/nuclear • robbery and/or major vandalism • sabotage • structure failure • terrorism • transport accident • war • water • weather/climate change
Business impact assessment/s may include:	• breach/reduction of customer service standards • cost/impact on existing and/or increased finance • escalating losses over time • impact of loss of business/resources • loss of revenue • potential fines/penalties/litigation costs • reputation/brand damage • statutory/regulatory breaches
Risk treatment may include:	• activating evacuation plan • activating lock down procedures • activating workplace emergency management plan • personnel working from home • relocation of facilities • resource replacement • temporarily suspending activities • transferring activities
Emergency response strategies may include:	• contact lists to report incident/s • documentation/reporting/recording procedures • evacuation plan • location of evacuation assembly point • lockdown procedures • names and responsibilities of wardens • personnel instructions for evacuation • process for accounting for personnel • workplace emergency management plan

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RANGE STATEMENT	
Continuity strategies may include:	• action required to resume critical business activities • contact lists of critical personnel and stakeholders • counselling • critical business activities and prioritisation of when they can/need to resume • list of resources • relocation to alternative worksite • resource replacement • treatment for critical business activities
Recovery strategies may include:	• damage assessment • process for assessing loss and filing insurance claims • relocation of business to original location • salvage and restoration of records, infrastructure and premises
Business continuity plan/s may include:	• introduction • organisational details • objectives • purpose • critical business functions • assumptions • processes • activation and stand down • responsibility • version control and maintenance • operational requirements • critical success factors • interdependencies • outage times • compliance • people • structure • roles and responsibilities • contact details • continuity arrangements • accommodation • resources • workarounds and alternative solutions

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RANGE STATEMENT	
	• continuity management tasks • communications • other plans
Emerging risk may include:	• act of god • civil unrest • communication with third party, e.g. phone call of bomb threat • environmental - human • insufficient finance • insufficient insurance • news bulletins • pandemic • terrorist
Incident may include:	• biological contamination • chemical exposure • detection of any of the risks as listed previously • fire • flood

Unit Sector(s)

Unit sector	

Competency field

Competency field	Industry Capability - Continuity

Co-requisite units

Co-requisite units		

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BSBCON601B Develop and maintain business continuity plans

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required knowledge updated to incorporate current Australian Standards. Replaces BSBCON601A Develop and maintain business continuity plans

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to work within the business continuity framework to develop and implement business continuity plans in order for an organisation to manage risk and ensure business resilience when faced with a disruptive event.

Application of the Unit

This unit is for individuals working in positions of authority who are approved to implement change across the division, business area, program area or project area.

This unit addresses the knowledge and processes necessary to develop and maintain business continuity requirements. Business continuity awareness and planning help the organisation to identify barriers and/or interruptions, and to determine how the organisation will achieve critical business objectives (even at diminished capacity) until full functionality is restored.

The focus is on risk and vulnerability assessment, business impact assessments, and business continuity and communication plans.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Conduct risk and vulnerability assessments	1.1 Identify the relationship between ***corporate risk*** and the ***organisation's*** business continuity management framework 1.2 Analyse and determine internal and external ***risk*** context by collecting information that relates to the organisation's priorities, operations and environment 1.3 Analyse and identify potential internal and external sources of disruption to the organisation's priorities, operations and environment
2. Develop and report on the business impact assessment/s	2.1 Identify the organisation's ***critical business functions*** and their ***dependencies*** and ***interdependencies***, and analyse and evaluate risks through the ***business impact assessment/s*** 2.2 Develop risk and disruption scenarios through the business impact assessment/s 2.3 Validate risk and ***disruption scenarios*** through the business impact assessment/s 2.4 Analyse, validate and report on the outcomes of the business impact assessment/s to ***management***
3. Develop, implement and report on risk treatments	3.1 Develop and implement risk treatments 3.2 Participate in ***risk treatment*** review 3.3 Report on risk treatment review to management and relevant appropriate personnel 3.4 Update risk treatment review in line with feedback provided by relevant personnel

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4. Determine interdependencies and develop response strategies	4.1 Develop the organisation's ***emergency response, continuity and recovery strategies*** 4.2 Consult and seek endorsement on the organisation's emergency response, continuity and recovery strategies from management and other appropriate personnel 4.3 Identify and manage synergies and conflicts in ***resource*** availability and access in conjunction with management 4.4 Coordinate the organisation's emergency response, continuity and recovery strategies
5. Establish the business continuity plan	5.1 Consult relevant personnel and seek support for the development of the organisation's ***business continuity plan/s*** 5.2 Ensure content of business continuity plan is comprehensive and meets, where applicable, the requirements of regulations, standards, industry practice and geographical dispersion 5.3 Document and analyse feedback received through consultation and finalise business continuity plan 5.4 Demonstrate accountability for the organisation's business continuity plan/s
6. Establish the communication plan within the organisation's planning framework	6.1 Identify ***stakeholders*** and determine objective and scope of ***communication plan*** for periods before, during and after disruptions occur 6.2 Determine organisation's communication capabilities in line with objectives and scope, and identify gaps and options for meeting shortfalls 6.3 Develop and implement across the organisation, appropriate risk and incident monitoring, reporting and escalation processes
7. Deliver business continuity professional development activities	7.1 Promote the application of the business continuity management framework and plan to all relevant personnel on an ongoing basis 7.2 Provide staff with appropriate information relating to the cyclical review process of the business continuity management plan 7.3 Conduct business continuity management plan ***exercises*** in line with the organisation's policies and procedures 7.4 Conduct post exercise debriefs, complete post exercise reviews and update business continuity strategies and plans as required 7.5 Manage and record staff learning and development in relation to the business continuity management framework in accordance with organisational requirements, and framework policies and

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	procedures 7.6 Report on the outcomes of staff learning and development, and business continuity framework exercises to relevant personnel

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to analyse relevant workplace information and data, and to make observations and connections between workplace tasks and interactions in relation to people, activities, equipment, environment and systems
- communication, teamwork and leadership skills to:
  - read and interpret an organisation's reports, policies and procedures in order to develop business continuity management plan/s
  - effectively communicate and work with a diverse range of individuals at all levels during and after a disruptive event
  - effectively negotiate the trust and confidence of colleagues and stakeholders
  - effectively undertake detailed business impact assessment activities across the spectrum of the organisation's stakeholders
- information technology skills to effectively respond to information technology issues
- initiative and enterprise skills to generate a range of options in response to a disruptive event
- planning and organisational skills to participate in or to establish the organisation's improvement and planning processes
- presentation skills to develop and present reports or presentations that deal with complex ideas and concepts, and to articulate information and ideas clearly
- research skills to undertake the necessary background research for risk and vulnerability assessment, business impact assessment and business continuity plan
- risk management and project planning skills to effectively develop and execute potentially complex business continuity planning strategies and plans
- stress management skills to work effectively and positively under the pressure of a major incident or situation within the workplace.

Required knowledge

- AS/NZS ISO 31000:2009 Risk Management - Principles and Guidelines
- Australian/New Zealand Standard Handbook AS/NZS 50:50 2010 Business Continuity: managing disruption related risk
- organisation's policies and procedures, including business continuity strategies

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- overall operations of the organisation, including existing data and information systems, paper and digital recordkeeping systems
- past and current internal, external and industry disruptions
- relevant legislation and regulations that impact on business continuity, such as OHS, environment, duty of care, contract, company, freedom of information, industrial relations, emergency management, privacy and confidentiality, due diligence, records management
- types of available insurance, what is required and insurance providers in relation to business continuity planning
- types of available recoverable services.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • knowledge of the organisation's overall business continuity framework and how it interrelates with the critical business functions • development and implementation of a business continuity plan that includes appropriate links to emergency response, disaster recovery plans and detailed continuity and recovery strategies • effective management of the communication and staff development activities relating to business continuity risk and vulnerability assessment.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace business continuity documentation • access to feedback from teams and management.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the participant • work based projects or case studies • observation of presentations • oral or written questioning to assess knowledge of business continuity management framework and business continuity plans

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	• review of documented critical success factors, and goals or objectives for area • review of risks prioritised for risk treatment and disruption scenarios • evaluation of business impact assessment • evaluation of business continuity and communication strategies and plans.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Corporate risk may include:	• electronic information security • espionage/commercial confidence/sensitivity breach • governance • insolvency • major fraud • professional negligence – threat of major legal action against directors.
Organisations may include:	• commercial enterprises • community • government • non-commercial enterprises • not-for-profit • religious organisations.
Risk may include:	• aeronautical • armed hold-up • biological • chemical • civil disturbance • disability/death of key person • economic • electronic

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	• erosion • explosion • fire • fraud • hazardous materials • industrial accident • infrastructure failure • market failure • natural disaster • operational collapse – insolvency • pandemic • pollution • privacy and confidentiality • radiological/nuclear • robbery and/or major vandalism • sabotage • structure failure • terrorism • transport accident • war • water • weather/climate change.
Critical business functions may include:	• business objectives • customer service functions • financial systems • human resource functions • management • OHS • organisational structure • payroll • records management.
Dependencies may include:	• office furniture • office supplies • personnel • support activities • systems and applications • vital records.
Interdependencies may include:	• communications • outsourcer and third party suppliers • power • sanitation

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	• security • transport • water.
Business impact assessment/s may include:	• breach/reduction of customer service standards • cost/impact on existing and/or increased finance • escalating losses over time • impact of loss of business/resources • loss of revenue • potential fines/penalties/litigation costs • reputation/brand damage • statutory/regulatory breaches.
Disruption scenarios may include:	• damage to/loss of critical infrastructure • information and intelligence – unavailable • equipment and other assets – unavailable • litigation • loss of access to building • loss of access to precinct • loss of access to records and organisational information systems • loss of building • loss of communications – voice • loss of communications – data • loss of distribution chain • loss of information technology systems • loss of number and availability of staff, including key staff • not meeting legal and business requirements • partnership dependencies – denial of access to goods and services from suppliers, outsourcers.
Management may include:	• chief executive officer • company board • delegated business continuity management director/officer • department managers • directors • supervisors.
Risk treatment may include:	• activating evacuation plan • activating lockdown procedures • activating workplace emergency management plan • personnel working from home • relocation of facilities • temporarily suspending activities

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	• transferring activities.
Emergency response strategies may include:	• contact lists to report incident/s • documentation/reporting/recording procedures • evacuation plan • location of evacuation assembly point • lock down procedures • names and responsibilities of wardens • personnel instructions for evacuation • process for accounting personnel • workplace emergency management plan.
Continuity strategies may include:	• action required to resume critical business activities to pre-disruption capacity • contact lists of critical personnel and stakeholders • counselling • critical business activities and prioritisation of when they can/need to resume • list of resources • relocation to alternative worksite • resource replacement • treatment for critical business activities.
Recovery strategies may include:	• customer confidence/relationship management • damage assessment • market re-establishment • process for assessing loss and filing insurance claims • relocation of business to original location • salvage and restoration of records, infrastructure and premises.
Resources may include:	• critical written and/or electronic records • emergency services • facilities and/or accommodation • finances • information technology infrastructure and applications management • insurance • personnel • plant and equipment • premises • telecommunications.
Business continuity plan/s may include:	• introduction • organisational details • objectives • purpose

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	• critical business functions • assumptions • processes • activation and stand down • responsibility • version control and maintenance • operational requirements • critical success factors • interdependencies • outage times • compliance • people • structure • roles and responsibilities • contact details • continuity arrangements • accommodation • resources • workarounds and alternate solutions • continuity management tasks • communications • other plans • checklists • maps and drawings.
Stakeholders may include:	• chief executive officer • company board • customers • directors • families/next-of-kin • funders • local community • media • personnel • professional bodies • shareholders • relevant government minister/s and department/s • regulators • sponsors • suppliers.
Communication plan may include:	• accessibility • assumptions • audience

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	• boundaries • business continuity terminology • capability • equipment • hierarchical organisational chart of internal and external emergency services personnel/delegates • mode • monitoring procedures • radio silence • reporting and recording procedures • sensitivities.
Exercises may include:	• drills • discussion exercises • modelling • planned walkthroughs • scenario planning and exercising • simulated exercises • testing.

Unit Sector(s)

Industry Capability – Continuity

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BSBCON701A Establish and review the business continuity management framework and strategies

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish and review the formal and/or informal business continuity management framework and strategies for an organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit is for individuals working in positions of authority who have the responsibility for embedding business continuity management into corporate or organisational levels of a business. This unit addresses the knowledge and processes necessary to establish, monitor and review the requirements of the business continuity management framework. The framework is important as it provides the processes and resources to ensure the continued achievement of critical business objectives in the event of a disruption (even at diminished capacity) until full functionality is restored.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Establish business continuity management framework	1.1. Gain support for the business continuity management framework from ***relevant personnel*** 1.2. Demonstrate clear sponsorship, responsibility and accountability for the business continuity management framework 1.3. In consultation with others, establish ***governance structures*** for the business continuity management framework, in line with the size of the organisation 1.4. Determine and seek approval for ***resources*** required to implement the business continuity management framework 1.5. Support relevant personnel to implement the business continuity management framework 1.6. Establish a management system for the

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ELEMENT	PERFORMANCE CRITERIA
	organisation's business continuity management program 1.7. Seek ***management*** approval of the organisation's business continuity management framework
2. Monitor the business continuity management framework and strategies	2.1. Develop an appropriate cyclical review process for monitoring the business continuity management framework 2.2. Provide relevant personnel with information relating to the cyclical review process for the business continuity management framework 2.3. Develop and seek approval of ***tools*** to verify and validate the business continuity management framework activities, processes and plans, appropriate to the organisation 2.4. Consult with relevant personnel about the implementation of the business continuity management framework 2.5. Monitor business continuity management framework learning, development and ***exercises*** across organisation
3. Review and evaluate the business continuity management framework and strategies	3.1. Review and analyse reports on business continuity management framework learning and development exercises 3.2. Review and analyse the organisation's communication strategy and implement changes 3.3. Review and update the overall business continuity management framework activities, processes, plans and resources according to results ***pre and post activation*** 3.4. Analyse and integrate the organisation's business impact assessment/s and identify ***dependencies*** and ***interdependencies*** if applicable 3.5. Implement and conduct business continuity management program audits

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE

Required skills

- analytical skills to:
  - assess relevant workplace information and data to determine and utilise resources, activities, equipment, environment and systems
  - investigate a critical incident and provide recommendations and remedies
- communication, teamwork and leadership skills to:
  - read and interpret an organisation's reports, policies and procedures in order to establish and review business continuity management framework
  - effectively and calmly communicate and work with a diverse range of individuals at all levels during and after a disruptive event
  - review and report on a critical incident to all relevant parties including being able to provide submissions to the chief executive officer (CEO), Board and Directors
  - effectively negotiate the trust and confidence of an organisation's personnel
  - demonstrate leadership across the organisation by acting as a positive role model
- information technology skills to understand complex information technology issues within the organisation's environment
- initiative, enterprise and problem solving skills to:
  - translate a range of ideas into appropriate action when a disruptive event occurs
  - solve problems individually and in teams in response to changing environments
- planning and organisational skills to establish and monitor the organisation's improvement and planning processes
- presentation skills to develop and present reports or presentations that deal with complex ideas and concepts, and to articulate information and ideas clearly to an appropriate audience
- project planning skills to effectively develop and execute potentially complex business continuity management frameworks, and to analyse and provide advice on business continuity management plans
- research skills to undertake the necessary background research for the development and monitoring of the business continuity management framework
- stress management skills to work effectively and positively under the pressure of a major incident or situation within the workplace

Required knowledge

- Australian/New Zealand Standard AS/NZS 4360:2004Risk Management
- Australian/New Zealand Standard HandbookAS/NZS HB221:2004 Business Continuity Management
- circumstances, barriers and/or interruptions that will disrupt, damage or inhibit the continuation of critical business functions
- organisation's current functionality,including existing data and information systems

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REQUIRED SKILLS AND KNOWLEDGE
• organisation's internal and external dependencies and interdependencies • organisation's policies and procedures, including risk management strategy • past and current internal, external and industry disruptions • relationship of the business continuity management framework to other business processes • relevant legislation and regulations that impact on business continuity, such as OHS, environment, duty of care, contract, company, freedom of information, industrial relations, privacy and confidentiality, due diligence, records management • types of available insurance, what is required and insurance providers in relation to business continuity planning

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • knowledge and understanding of an organisation's culture and capabilities, and the need for sustainable business continuity management planning • demonstrated ability to think strategically and to work effectively with others to establish a business continuity management framework for an organisation.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace business continuity documentation • access to feedback from teams and all levels of management.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence • third party workplace reports of on-the-job performance by the participant • observation of presentations

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EVIDENCE GUIDE	
	• work based projects or case studies • oral or written questioning to assess knowledge of business continuity management framework.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the participant, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant personnel may include:	• chief executive officer • company board • delegated business continuity management officer • directors • department managers • supervisors • chief financial officer (CFO) • chief operating officer (COO) • workplace health and safety officers (WHSO)
Governance structures may include:	• authorisation processes • development and coordination of business continuity management framework • monitoring the business continuity management framework • organisational chart showing management functions and reporting responsibilities • tracking and measurement of performance and outcome of the business continuity management framework
Management may include:	• chief executive officer • company board • delegated business continuity management

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RANGE STATEMENT	
	director/officer • department managers • directors • supervisors
Resources may include:	• critical written and/or electronic records • emergency services • facilities and/or accommodation • finances • information technology infrastructure and applications management • insurance • media relations/communications officer • outsourced services • personnel/human resources • plant and equipment • premises • telecommunications • salvage crew • training personnel
Tools may include:	• component testing (simple checks) • desktop scenario tests • financial audit • hazard and risk identification documentation • information systems • live simulation tests • performance audits • plant and equipment maintenance schedules • technical testing (detailed checks) • workplace health and safety audit
Exercises may include:	• drills • discussion exercises • modelling • planned walkthroughs • scenario planning and exercising • simulated exercises • testing
Pre and post activation may include:	• aims and objectives for business continuity management exercise plan • amendment of business continuity management plan following exercise

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RANGE STATEMENT	
	• assessment of current business continuity management plan • feedback documentation from exercises • identification of emerging threats and risks
Dependencies may include:	• office furniture • office supplies • personnel • systems and applications • vital records
Interdependencies may include:	• communications • outsourcer and third party suppliers • power • sanitation • security • transport • water

Unit Sector(s)

Unit sector	

Competency field

Competency field	Industry Capability - Continuity

Co-requisite units

Co-requisite units		

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BSBCRT101A Apply critical thinking techniques

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to use fundamental critical thinking skills. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to all individuals who need the capacity to think critically and apply that thinking to a range of situations and challenges. It is relevant to all work and life situations, and focuses on the conscious development of skills to ask essential questions and to consider answers to those questions. 'A mind with no questions is a mind that is not intellectually alive. No questions (asked) equals no understanding (achieved).' Foundation for Critical Thinking

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Examine the value of curiosity and questioning	1.1. Appraise the ***value of curiosity and questioning*** in both work and life situations 1.2. Consider how ***different types of questions*** and styles of questioning apply in diverse situations
2. Develop the habit of asking questions and wondering why	2.1. Reflect on and wonder about issues and situations 2.2. Ask ***questions of self*** to challenge and expand individual thinking 2.3. Ask ***questions of others*** in a constructive way to seek broader knowledge and understanding 2.4. Identify ***situations when too much wondering and questioning may be inappropriate or ineffective*** 2.5. Assess the best ways to structure questions for different situations
3. Contribute to answers as well as questions	3.1. Take ***responsibility for answering questions*** as well as for asking them 3.2. From many possible questions, determine the ***key***

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ELEMENT	PERFORMANCE CRITERIA
	question to be answered 3.3. Identify and access ***information needed to answer the question*** 3.4. Sort the facts from ***other information*** in developing a response 3.5. Check own ***preconceptions and assumptions*** and determine their validity 3.6. Reach a well-considered conclusion or answer, without ruling out more questions or further exploration 3.7. Use conclusions and answers in positive, practical and timely ways

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to actively listen and to ask questions of others in a constructive way
- critical thinking and problem-solving skills to formulate and ask relevant questions, and come up with appropriate answers
- comprehension skills to interpret and distil key information of relevance to a given situation.

Required knowledge

- different types of questions and their relevance to different situations
- techniques to assist in forming the habit of asking questions and taking responsibility for answers
- typical blockers to the critical thinking process
- why questions are important and the benefits of asking good questions for individuals, businesses and communities (the importance of critical thinking).

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • application of a conscious process of questioning to achieve new understandings • knowledge and understanding of how critical thinking and questioning impacts on individual lives, the broader community and work situations.
Context of and specific resources for assessment	Assessment must ensure: • interactions with specific challenges and situations to demonstrate the application of critical thinking (this would usually involve interactions with others).
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of a candidate blog exploring different ideas and questions • review of candidate response to scenarios that allow the candidate to apply critical thinking techniques to a particular life or work situation, and to demonstrate ability to portray curiosity and exploration of new concepts • evaluation of candidate response to the challenge of adopting different perspectives on a situation, and ability to both develop and respond to questions from those perspectives • observation of the candidate participating in a group problem-solving session • oral or written questioning to assess knowledge of typical blockers to the critical thinking process.
Guidance information for assessment	Critical thinking always occurs in a specific context. Therefore holistic assessment with other units relevant to the industry sector, workplace and job role is highly recommended. Assessors must, however, retain a strong focus on the critical thinking skills as described in this

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EVIDENCE GUIDE	
	unit.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Value of curiosity and questioning might relate to:	• developing a more efficient way of doing something • developing a new idea • developing and improving products and services • enhancing skills and career opportunities • enhancing the physical environment • financial benefit • greater personal satisfaction • improving interpersonal relationships
Different types of questions may include questions about:	• accuracy • breadth • clarity • depth • emotion • fairness • logic • meaning • precision • relevance • significance • social engagement • society • style • taste
Questions of self may include:	• am I being distracted by irrelevant information?

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RANGE STATEMENT	
	• are claims warranted? • are there any unstated assumptions? • could I do this differently or better? • do I have any ideas to share about this? • have I seen something that may have application here? • how can I do that? • how can I fix this? • how long will that take? • if they are doing that, could I? • is this a reliable source? • is this relevant to me? • was I fair? • what are the real facts of this situation?
Questions of others may include:	• do we have a budget? • how did you come up with that? • how do you feel about that? • how does that work? • what does it mean? • why do you want me to do it like that? • why do we do it like that? • why is it so?
Situations when too much wondering or questioning may be inappropriate or ineffective may relate to:	• contractual agreements • extreme time pressure or non-negotiable deadlines • financial limitations • procedures determined by laws or other regulations • safety issues • when others are totally closed to new ideas
Responsibility for answering questions may involve:	• acknowledging shared responsibility • adopting a positive 'can do' attitude • following up on practical details • pro-actively seeking information • suggesting a new approach • talking to others about possible answers
Key question to be answered may be determined by:	• constraints of the broader context and environment • overall goal - what needs to be achieved • personal hopes and expectations

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RANGE STATEMENT	
Information needed to answer the question may be:	• accessed by observing people • already inside own head • in journals, books or other printed materials • in workplace documents • in a hardware store • on the internet • with colleagues • with friends or family
Other information may be:	• opinions • own assumptions or those of others • personal prejudice • spin or public relations
Preconceptions and assumptions may relate to:	• assumptions about the way others are thinking • established ways of doing things • existing ideas, products and services • risk aversion • self-imposed limitations on what is possible

Unit Sector(s)

Unit sector	

Competency field

Competency field	Creativity and Innovation - Creative Thinking

Co-requisite units

Co-requisite units		

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BSBCRT301A Develop and extend critical and creative thinking skills

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop the habit of thinking in a more creative way. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who need to develop and extend their critical and creative thinking skills. Creative thinking involves looking at things differently, musing, testing, experimenting and challenging existing thought patterns. Creative thinking can take place anywhere - at home, at work, lying in bed at night, in the shower or on the bus. It can be applied to any type of issue or situation. When used effectively it can assist with the improvement of existing, or the development of entirely new or innovative services, products or processes. Sometimes creative thinking may pay off in a seemingly unconnected way at a future time and in an apparently unrelated context. Creative thinking can be learnt and applied through thoughtful application of skills related to observation, analysis, reflection, problem solving, evaluation and critical appraisal. Effective use of creative thinking skills opens up new opportunities for individuals, businesses and communities.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop a questioning mindset	1.1. Develop the habit of asking ***questions*** from ***different perspectives*** 1.2. Take responsibility for exploring a variety of information sources to provide relevant answers to own questions 1.3. Sort through information and ideas to identify the central questions, issues and challenges 1.4. Challenge preconceptions and assumptions to determine actual constraints in defining a problem for resolution

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ELEMENT	PERFORMANCE CRITERIA
2. Generate ideas and responses	2.1. Explore and use a range of ***creative thinking techniques*** to generate ideas and responses 2.2. Muse on, play around with and have fun with ideas in relation to a perceived objective 2.3. Identify and challenge ***blockers to creative thinking*** 2.4. Consider and explore realities beyond the current situation 2.5. Evaluate, and where appropriate, challenge ***existing boundaries*** to determine perceived or actual constraints 2.6. Show willingness to take ***risks with ideas and thought processes*** 2.7. Look around in ***familiar and unfamiliar places*** for new inspiration and habitually record observations, experiences, ideas and reflective thoughts to broaden personal knowledge base 2.8. Acknowledge and accept the opportunity for revelation when least expected 2.9. Identify connections and associations from things that seem unconnected
3. Challenge, test and re invent ideas	3.1. Identify, interrogate and challenge the assumptions behind ideas 3.2. Experiment with variations, and explore and challenge a range of different solutions and ideas 3.3. Consciously change perspectives, and evaluate ideas and situations in new ways 3.4. Where appropriate, involve others in ideas and how they might change or be improved
4. Enhance creative thinking skills	4.1. Consciously challenge and question own thought patterns and ways of responding to work and life situations 4.2. Identify and take opportunities to self-assess and to learn about new ideas and different ways of thinking 4.3. Take opportunities to practise and experiment with creative thinking techniques across work and life situations 4.4. Pro-actively talk to others about ways that new ideas and patterns of thinking can be encouraged and developed

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• creative thinking skills to participate effectively and actively in a range of creative thinking activities • literacy skills to explore and analyse information dealing with potentially complex concepts from a wide range of sources • problem-solving skills to tease out central themes and issues, and to respond with a range of ideas and solutions • reflective learning and self-management skills to question and challenge own skills and practice, to identify and access learning opportunities, and to be prepared to learn new things in unfamiliar areas.
Required knowledge
• common blockers to creative thinking, both from an individual and organisational perspective • definitions, concepts and history of creativity at an overview level • different creative thinking techniques and how they work, including daydreaming and mental wandering, wishful thinking, use of metaphors and analogies, trigger words, morphological analysis, brainstorming visualisation, mind mapping, lateral thinking games, Edward de Bono's six thinking hats, making associations and storytelling • how creativity applies everywhere, not just in traditionally 'creative' contexts • impacts of creative thinking on individuals, communities and businesses • techniques for filtering to process diverse information • ways of extending and developing individual creative thinking skills.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential: • active participation in a range of creative thinking

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EVIDENCE GUIDE	
competency in this unit	activities, including ability to ask relevant questions and to generate a range of ideas in response to a given situation or issue • understanding of creativity and creative thinking at a basic level, including its impact and importance for individuals, communities and businesses • knowledge and application of different creative thinking techniques and processes to a range of situations.
Context of and specific resources for assessment	Assessment must ensure: • interactions with challenges, situations and scenarios to which creative thinking may be applied (usually this would involve interactions with others to reflect the nature of the creative thinking process).
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • direct observation of the candidate participating in collaborative creative thinking activities • evaluation of ideas generated by the candidate (with or without others) and of the processes used to generate and test those ideas • evaluation of a presentation made by the candidate articulating the process of developing ideas or pieces of work, plus evaluation of candidate debating and discussing ideas with others • evaluation of a (non-computerised) game developed by the candidate, played with others, challenged and re-invented • oral or written questioning to assess knowledge of creative thinking techniques, concepts and definitions of creativity.
Guidance information for assessment	Creative thinking always occurs in a specific context. Therefore holistic assessment with other units relevant to the industry sector, workplace and job role is highly recommended. Assessors must, however, retain a strong focus on the creative thinking skills as described in this unit.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Questions may include:	• are there any boundaries I need to consider? • are there new ideas we can bring to this situation? • how could I solve this problem? • is there a different way of doing this? • what am I or others trying to do? • what do I need to do to make this better? • what extra information do I need? • what is missing? • what is required? • who do I need to talk to about this? • why is this so?
Different perspectives may be those of:	• clients or customers • family members • friends • funding bodies • general public • history • organising committees • regulatory authorities • self • specialists or experts • supervisors or managers • work colleagues

Creative thinking techniques may include:	• brainstorming:
	  • stop and go
	  • sequencing
	  • buzz session
	  • bulletin board
	  • computer-aided

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RANGE STATEMENT	

	• daydreaming and mental wandering
	• Edward de Bono's six thinking hats
	• ego alter or heroes
	• graphic organisers:
	  • visual maps
	  • webbing
	  • concept fans
	• lateral thinking games
	• making associations
	• mind mapping
	• morphological analysis
	• storytelling
	• sub-culture surfing
	• trigger words
	• use of metaphors and analogies
	• vision circles
	• visualisation
	• wishful thinking
	• word salads

Blockers to creative thinking may be:	• cultural
	• emotional
	• environmental
	• family
	• ideas and perceptions about how we should behave, such as:
	  • play according to the rules
	  • don't ask questions
	  • don't be silly
	  • do as you're told
	  • be practical
	  • (taken from Lotherington 2003: Flicking Your Creative Switch)
	• intellectual
	• peer pressure
	• perceptual
	• risk aversion
	• 'way it's done round here'

Existing boundaries may relate to:	• available resources (human, financial, physical) • established tradition or practice in a given field of activity

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RANGE STATEMENT	
	• communication protocols • procedures and processes • specifications • unspoken agreements about who does what and how • work conditions
Risks with ideas and thought processes might involve:	• accepting the limitations of one's own knowledge or capacity • challenging established authority • challenging the continuation of current ways of doing things • changing the rules • exposing oneself or others to possible criticism • facing personal fears and apprehensions • letting go of control • radically changing long established tradition, practice or norms • taking financial risks • taking self or others outside of a comfort zone
Familiar and unfamiliar places may include:	• colleagues • community groupings • friends • hardware stores • information sources with little direct link to the question at hand • journals • junk stores • libraries • museums • recycling yards • shopping centres • websites • workshops

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Creativity and Innovation - Creative Thinking

Co-requisite units

Co-requisite units		

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BSBCRT401A Articulate, present and debate ideas

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to articulate, present and debate ideas. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who need to present and debate ideas in a work or broader life context. While the unit shares some similarities with units such as BSBCMM401A Make a presentation or BSBRES401A Analyse and present research information, the focus is quite different. This unit focuses on the creative ways in which ideas can be presented to provoke response, reaction and critical debate. Risk taking, storytelling and participation in critical debate are key features of the unit. Ideas might be quite complex in nature and relate to new products, services, creative works or new ways of doing things.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Analyse ideas for communication to others	1.1. Distil ***key themes***, ***messages and positions*** to aid in clarity of thought and presentation 1.2. Reflect on ***different ways of communicating ideas*** for different purposes and to different people 1.3. Identify the enabling skills and attributes of ***individuals*** who can effectively participate in discussions about ideas
2. Provoke response and reaction	2.1. Explore and use ***different techniques to engage***, ***fascinate and involve others*** in the process of communication and exchange 2.2. Explore the ways that storytelling can be used to communicate ideas 2.3. Create ***innovative approaches to different communication challenges*** 2.4. Be prepared to take ***risks*** in the way ideas are

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ELEMENT	PERFORMANCE CRITERIA
	presented 2.5. Identify ***specific ways to provoke and encourage response*** in particular individuals or groups
3. Debate and discuss ideas	3.1. Present and argue ***substantiated positions*** on ideas 3.2. Be open to critical analysis of own ideas and to the ideas of others 3.3. Identify and participate in conversations that challenge and explore different concepts and approaches, and generate new ideas 3.4. Respond to questions about ideas with confidence and relevant information 3.5. Reflect on and appraise the views of others, and use to refine ideas and to embrace new ideas

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to present ideas in ways that engage and provoke response, and to debate and discuss potentially complex concepts
- creative thinking skills to develop responses and new ideas in response to feedback
- learning and self-management skills to actively seek feedback and to learn from others
- literacy skills to develop and interpret information dealing with complex ideas.

Required knowledge

- creative and different ways of expressing and communicating ideas, and of making an opportunity pitch
- different ways in which individuals receive and respond to ideas and information, and what influences their response
- nature and role of risk taking in the presentation and debate of ideas
- role of storytelling in communicating ideas and key storytelling techniques
- techniques to tailor comments to particular audiences.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • creative and articulate presentations that provoke interest and response • active and confident participation in critical debate and discussion of ideas.
Context of and specific resources for assessment	Assessment must ensure: • presentations to others about ideas • discussion and debate with others about ideas.
Method of assessment	A range of assessment methods should be used t assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • direct observation of candidate participation in presentations and debates • evaluation of candidate's skills in responding to new and different communication situations • evaluation of candidate telling a story, making a pitch or presenting ideas to complete strangers in 'different' environments (e.g. in a restaurant, in the corridor, on a bus, in a lift).
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating

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RANGE STATEMENT	
conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Key themes, ***messages and positions*** may relate to:	• essence of the idea • influences on the idea • relationship of idea to established tradition or practice • relationship of idea to new and emerging technology • problems and challenges with the idea • reasons why the idea should be supported • selling a creative team • selling creative ideas • selling self as a creative person • way the idea was developed • who had developed the idea and why
Different ways of communicating ideas may be:	• aural • group presentation/pitch • in a forum • in elevators • one-on-one discussion • on planes • oral • remote (e.g. video conferencing) • visual
Individuals may be:	• colleagues • community members • friends • gallery owners • interviewers (media) • investors • mentors • panels • peers • students • supervisors or managers
Different techniques to engage, ***fascinate and involve others*** may include:	• blogging • media releases • multimedia presentations • music

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RANGE STATEMENT	
	• photography • storytelling • viral marketing • visual depictions
Innovative approaches to communication challenges may involve ability to:	• get across all key messages in a short time • present on unfamiliar topic • respond to impromptu situations • structure information quickly and effectively
Specific ways to provoke and encourage response may include:	• use of engaging objects to explain idea
Risks may involve:	• acknowledging own limits and difficulties • asking for help • breaking out of accepted norms • divulging personal information or vulnerabilities • failing and learning from it • incorporating humour • taking a fun approach with a potentially serious audience
Substantiated positions may be positions which are:	• grounded in appropriate research • result of rational and logical thought • subjected to the analysis of others (e.g. peer review) • supported by relevant information

Unit Sector(s)

Unit sector	

Competency field

Competency field	Creativity and Innovation - Creative Thinking

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Co-requisite units

Co-requisite units		

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BSBCRT402A Collaborate in a creative process

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to collaborate in a creative process. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who participate in a collaborative creative process in a work or broader life context. It is relevant to individuals who are involved in what is traditionally considered creative endeavour but is also very important in broader business and community activities where creative team effort is highly valued. The unit focuses on effective engagement in a collaborative process, underpinned by a commitment to trust and ethics as a key feature of collaborative creative effort.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Enter into a collaborative creative process	1.1. Adopt a ***personal philosophy of trustworthy and ethical behaviour*** 1.2. Maximise the possibilities of sustaining creative partnerships through trustworthy and ethical behaviour 1.3. Use ***professional discretion and judgement*** in dealing with others 1.4. Acknowledge and respect the ***different ways that different people may contribute*** to the creative process 1.5. Acknowledge and work within the legal framework that applies to creative content as part of individual commitment to an ethical approach 1.6. Respect collaborative efforts by relinquishing individual ownership of ideas
2. Engage in a collaborative creative	2.1. Maintain a ***belief in personal ideas***, combined with a willingness to move on as ideas are discarded and

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ELEMENT	PERFORMANCE CRITERIA
process	others evolve 2.2. Be prepared to let go of own vanity and ego to allow new ideas to emerge 2.3. Use ***language*** and adopt a ***demeanour*** that demonstrates respect and trust for others 2.4. Listen to, value, respect and trust the contributions of others as material to work with rather than positions to argue against 2.5. Challenge, test and share ideas in a supportive way as part of the creative process 2.6. Move on from initial positions and preconceptions to accept and embrace new and unpredictable ideas as they emerge during the creative process 2.7. Play a role that encourages the ***movement and shift of ideas*** within the group towards a well-conceived solution
3. Reflect on own role in the collaborative creative process	3.1. Reflect on own level of participation, relationships with others and personal behaviour in the collaborative process 3.2. Identify ways to do better next time and follow up on any issues that need to be resolved 3.3. Identify and seek opportunities to refine and expand own skills and knowledge, including learning from failing

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to nurture trust, to model open and supportive communication, and to articulate potentially complex ideas • creative thinking skills to generate and explore ideas • learning and self-management skills to reflect on and enhance own ability to contribute effectively to a collaborative creative process • problem-solving skills to continually be evaluating and challenging ideas and moving them forward towards solutions.

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge
• concept of shared intellectual property from collaborative creativity • concepts of trust and ethical behaviour in the context of creative endeavour • different roles people may play in a collaborative creative process and how this contributes to the overall effort • how the creative process works in different situations (e.g. as an individual, as part of a group) • how the potential for creativity can be maximised within a team • legal framework that affects copyright, moral rights and intellectual property issues • what stops creativity in a group environment.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • positive and full participation in a collaborative creative process that generates, expands and develops ideas into a well-conceived solution • communication and creative-thinking skills that make a positive contribution to the collaborative effort • knowledge and understanding of the ethical framework in which any type of creative endeavour operates.
Context of and specific resources for assessment	Assessment must ensure: • involvement of a team of people in the collaborative creative process.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

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EVIDENCE GUIDE	
	• direct observation of the candidate participating in collaborative creative activity • interviews with others participating in the process to determine the nature and quality of the candidate's participation and interactions • evaluation of candidate presentation (verbal or written) on the collaborative process, including challenges, benefits and key learning for the future • oral or written questioning to assess knowledge of concepts of trust and ethical behaviour in the context of creative endeavour.
Guidance information for assessment	A collaborative creative effort always occurs in a specific context. Therefore holistic assessment with other units relevant to the industry sector, workplace and job role is highly recommended. Assessors must, however, retain a strong focus on the key aspects of collaboration and creativity detailed in this unit. Combined assessment with the following unit would also be appropriate: • BSBCRT301A Develop and extend critical and creative thinking skills.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Personal philosophy of trustworthy and ethical behaviour may relate to:	• acknowledging discomfort or anger • being prepared to fully participate • communicating in an open way • honesty • honouring commitments • sensitivity to social, cultural, personal situations and dynamics • showing respect • understanding of the consequences of actions

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RANGE STATEMENT	
Professional discretion and judgement may relate to:	• assessing when to keep quiet • being aware of and responding to different personality types • knowing when it is appropriate or inappropriate to share information • knowing with whom information should be shared
Different ways that different people may contribute may relate to:	• different approaches to expressing opinions or ideas • inclinations to lead or follow • influence with others • interpersonal skills • networks • past experience • technical skills and expertise
Belief in personal ideas may be demonstrated by:	• backing ideas up with information and rationale • being prepared to argue for own ideas • confidence in own ability to create many ideas • confidence to share ideas • confident articulation of ideas • spending time developing and refining own ideas
Language that demonstrates respect for others may involve:	• acknowledging new ideas and effort • avoiding negative words • avoiding personal negatives like 'you cannot' or 'you should not' • choosing words wisely • listening • making differentiations between ideas and people • managing tone • speaking at a level appropriate to the listener
Demeanour that demonstrates respect for others may relate to:	• avoiding intellectual bullying • encouraging others to express ideas • facial expression • keeping a positive mindset • listening before speaking • physical position • refraining from blame or accusation

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RANGE STATEMENT	
	• other non-verbal behaviour • understanding the balance between constructive comment and attention seeking
Movement and shift of ideas may involve:	• building in 'what if' scenarios • encouraging a stocktake before moving forward • making connections between seemingly disparate ideas • refining ideas that seem positive • returning to earlier ideas • returning to key objectives • suggesting new processes • turning ideas 'on their head' to resolve blockages

Unit Sector(s)

Unit sector	

Competency field

Competency field	Creativity and Innovation - Creative Process

Co-requisite units

Co-requisite units		

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BSBCRT403A Explore the history and social impact of creativity

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to explore the history and social impact of creativity. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who develop and apply knowledge of the history of creativity at a broad rather than deep level. Understanding the concept of creativity, how creative people think and how creativity has been applied through history can provide individuals with inspiration and ideas to take into their own work and lives. More complex research on theories of creativity is found in BSBCRT601A Research and apply concepts and theories of creativity.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Investigate the history of creativity	1.1. Identify relevant ***sources of information*** on the history of creativity 1.2. Investigate and review different definitions of creativity and how these relate in an historical context 1.3. Assess the ways that individuals and collaborative groups have demonstrated creativity 1.4. Explore the relationship between creativity and different cultures and relate these to current contexts
2. Assess the impacts of creativity	2.1. Explore the ***impacts of creativity*** on the ways that people live and work 2.2. Explore the ways in which creativity has occurred in ***different fields of human endeavour*** 2.3. Determine and evaluate the ***factors that affect the presence or extent of creativity*** in a given situation
3. Evaluate the potential for enhancing	3.1. Extract key information and ideas from the history of creativity for possible relevance to own life and

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ELEMENT	PERFORMANCE CRITERIA
creativity in own life	work 3.2. Discuss and explore ideas with others 3.3. Reflect on how creativity or creative thinking might be integrated into own life and work 3.4. Identify and access ***opportunities to build own creative thinking skills***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to discuss and explore ideas about creativity with others • comprehension skills to interpret information dealing with potentially complex ideas.
Required knowledge
• impact of creativity at different points in history, including contemporary perspectives • potential links between the history of creativity and current individuals and communities • sources of information on the history and social impact of creativity • ways in which different factors impact on creativity and how it is demonstrated in various cultural contexts.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential: • knowledge and understanding of the history and

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EVIDENCE GUIDE	
competency in this unit	social impact of creativity, including its contemporary relevance to individuals and communities.
Context of and specific resources for assessment	Assessment must ensure: • access to sources of information on the history of creativity.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of candidate's exploration of creativity and its impact, demonstrated through oral or written presentation • oral or written questioning to assess knowledge of creativity in an historical and contemporary context • review of identification of opportunities to build own creative thinking skills.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Sources of information may include:	• artistic works (visual, aural, oral) • arts co-operatives • clubs • friends and family • internet • printed references and texts • production teams

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RANGE STATEMENT	
Impacts of creativity may include:	• archaeological discoveries • botanical/anthropological discoveries • change in nature of communication between individuals and communities • changed relationships between gender and generations • changes in style • conservative versus adventurous culture and social mindset • improvement in living conditions • new products and services • reduced costs • scientific discoveries • sudden or gradual political change • totally new ways of undertaking tasks
Different fields of human endeavour may be:	• agriculture • arts • science • subsistence - primitive societies • technology
Factors that affect the presence or extent of creativity may include:	• culture • economic • environmental • family • friends • political • right time and place • social
Opportunities to build own creative thinking skills may include:	• attendance at seminars • participation in creative activities • reviewing and adapting own communication skills • using new approaches to work • working in creative communities

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Creativity and Innovation - Creative Thinking

Co-requisite units

Co-requisite units		

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BSBCRT501A Originate and develop concepts

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to originate and develop concepts for products, programs, processes or services to an operational level. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who originate and develop concepts of some complexity and progress that concept to the point where it can be implemented. Individuals may be employed by organisations, be sub contractors or consultants brought in by companies to work on specific projects, or be individuals or part of a team working independently. Concepts could be developed for any business or community activity or process such as marketing campaigns, staff development programs, information technology and communication systems. This unit is also highly relevant to practitioners in the creative industries who develop products such advertising campaigns, radio and television programs, entertainment events, films, exhibitions and digital media products. A person undertaking this role would operate with a high degree of autonomy and at a senior level if working within an organisation. However, the process of generating concepts and ideas is collaborative in nature. Skills associated with writing proposals to support concept development are covered in BSBWRT401A Write complex documents.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Evaluate and explore needs and opportunities	1.1. Research and evaluate ***existing information that informs new concept development*** 1.2. Where appropriate, identify and use gaps in current range of ***products***, ***programs***, ***processes or services*** as the catalyst for generating new ideas or concepts 1.3. Expand the potential of new ideas through ***exploration of opportunities beyond the obvious***

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ELEMENT	PERFORMANCE CRITERIA
	1.4. Identify ***factors*** that could have an impact on ideas or concepts to be developed, including potential for commercialisation 1.5. Determine whether other players are filling identified gaps or investigating similar opportunities 1.6. Develop preliminary ideas on innovative and different ways to address needs and opportunities 1.7. In consultation with ***relevant stakeholders***, agree on broad parameters for developing ideas and concepts to meet market requirements
2. Develop a range of creative approaches	2.1. Use a range of ***creative thinking techniques*** to generate innovative and creative concepts to address identified needs 2.2. Challenge, test and experiment with different concepts and ideas as part of a collaborative process 2.3. Evaluate concepts in terms of their suitability for the target audience or purpose, their feasibility and their commercial potential 2.4. Take account of social, ethical and environmental issues as concepts and ideas are generated and discussed 2.5. Identify ***resources*** required to achieve desired creative and innovative outcomes 2.6. Evaluate the effectiveness of different strategies for achieving desired outcomes 2.7. Select concepts or approaches that achieve required outcomes in an innovative and feasible way 2.8. Present proposed concepts or approaches in an appropriate ***format***
3. Refine concepts	3.1. Ensure concept development process is open to ongoing refinement and testing 3.2. Seek input and feedback on concepts from relevant stakeholders 3.3. Seek specialist advice on creative and technical aspects of proposals as required 3.4. Compare concepts with best practice examples of similar products, programs, processes or services 3.5. Use a range of ***creative and practical criteria*** to determine the advantages and disadvantages of different concepts 3.6. Evaluate ***constraints*** on the realisation of concepts or ideas

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ELEMENT	PERFORMANCE CRITERIA
	3.7. Refine proposals based on analysis and feedback
4. Develop concepts to an operational level	4.1. Use refined concepts as the basis for developing detailed ***implementation specifications***
	4.2. Present specifications to relevant parties for approval, funding or endorsement
	4.3. Reflect on methodology used to generate concepts and ideas and note ways of improving this in the future

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and teamwork skills to work collaboratively on ideas and to articulate the rationale for concepts in ways that promote constructive discussion with others
- creative thinking skills to generate a range of innovative concepts and ideas, to use lateral thinking and to take a visionary approach to developing concepts and ideas
- initiative and enterprise skills to pro-actively identify market requirements
- planning and organising skills to take account of practical issues for concept implementation
- self-management skills to meet deadlines.

Required knowledge

- broad context in which concepts are being developed
- cultural, social and environmental issues and impacts to be considered in developing new concepts
- issues and requirements to commercialise the concept
- legal requirements that affect work in a given industry context
- practical and operational issues to be considered in a specific work or community context
- range of broad practical and operational issues that determine whether a concept can be implemented (in any context)
- techniques for generating creative ideas and solutions, and for translating these ideas into workable concepts.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of at least two concepts, substantiated and supported with sufficient information to allow for implementation to occur • generation of concepts and ideas that provide innovative solutions to identified issues • knowledge of legal requirements that affect work in a given industry context.
Context of and specific resources for assessment	Assessment must ensure: • access to the full range of background information required to evaluate the operational factors that will affect the implementation of concepts • interaction with others to reflect the collaborative nature of the concept development process.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of concepts generated by the candidate, of the processes used to generate and test the ideas and the material developed to support the concept • debate and discussion with the candidate to assess knowledge of the operational context and the broader factors that impact on concept development • evaluation of presentation or 'pitch' made by the candidate in relation to a particular concept • oral or written questioning to assess knowledge of cultural, social and environmental issues and impacts to be considered in developing new concepts.
Guidance information for assessment	

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Existing information that informs new concept development may include:	• creative brief • market research • organisational vision • personal vision and creative aspiration
Products, ***programs***, ***processes or services*** may include:	• art and craft works • advertising campaigns • business services and processes • designs • festivals • films • interactive digital media products • live entertainment productions or events • manufactured products • marketing and promotional campaigns • museum and gallery exhibitions • photoimaging services • radio or television programs
Exploration of opportunities beyond the obvious may involve:	• challenging existing assumptions and preconceptions • considering radical change to the way things are done • exploring practice in a totally different industry context • investigating the use of new media • making connections between seemingly unrelated activities
Factors may include:	• codes of practice • content • cost effectiveness • features of interactive digital media products:

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RANGE STATEMENT	
	• delivery platform • level of interactivity • look and feel • navigation • Indigenous laws and protocols • length of program or film • level of skill and understanding required for implementation • nature and size of target audience • organisational charter and policies • purpose: • advertising or marketing • commercial • educational • entertainment • game • information • relevant legislation, such as: • copyright and intellectual property • privacy • results of market research • revenue raised by existing market share • technical feasibility
Relevant stakeholders may include:	• administrative staff • clients/customers • designers and other creative personnel • directors • external suppliers • information technology personnel • management • program producers • technical specialists • writers
Creative thinking techniques may include:	• brainstorming: • bulletin board • buzz session • computer-aided • sequencing • stop and go

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RANGE STATEMENT	

	• Edward de Bono's six thinking hats
	• ego alter or heroes
	• graphic organisers:
	  • concept fans
	  • visual maps
	  • webbing
	• lateral thinking games
	• making associations
	• mind mapping
	• morphological analysis
	• sub-culture surfing
	• trigger words
	• use of metaphors and analogies
	• vision circles
	• word salads
	• visualisation

Resources may include:	• computer hardware and software • facilities • printed material • specialist equipment • specialist staff • training
Formats may include:	• application forms to funding bodies or sponsors • briefs for consultants • concept maps • electronic presentations to promote the concept • in-house proposal forms
Creative and practical criteria may include:	• cost-effectiveness • evaluation against competing priorities • fit with personal vision and aspirations • fit with strategic directions of organisation • fit with target market needs • how innovative the concept is • level of risk • potential benefits • technical feasibility • time to realise the concept
Constraints may include:	• availability of resources and equipment

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RANGE STATEMENT	
	• availability of skilled experts and personnel • cost • level of technical difficulty • limited funding sources • limited potential for commercialisation • time
Implementation specifications may include:	• briefs for work • detailed specification of concept including purpose and content • operational plan with responsibilities and time lines • resources breakdown (financial, human and physical)

Unit Sector(s)

Unit sector	

Competency field

Competency field	Creativity and Innovation - Creative Thinking

Co-requisite units

Co-requisite units		

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BSBCRT601A Research and apply concepts and theories of creativity

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake research into different concepts and theories of creativity, and to apply those to a particular field of endeavour. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who use sophisticated research and critical analysis skills in the exploration of creativity and its application to work and life practice. This research may be related specifically to fields of practice traditionally considered as 'creative', such as the arts, but may equally relate to much broader fields of human activity and endeavour. The scope of the research activity has both significant depth and breadth. A broader, more general approach to the ideas and history surrounding creativity is found in BSBCRT403A Explore the history and social impact of creativity.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Research concepts and theories of creativity	1.1. Use a range of ***research techniques*** to source information about creativity 1.2. Identify and explore potential ***new***, ***emerging and alternative sources of ideas and thinking*** about creativity 1.3. Expand own knowledge and understanding of creativity through review and ***critical analysis*** of information 1.4. Analyse, compare and contrast a ***range of theoretical perspectives and thinking*** on creativity 1.5. Identify and explore the transmigration of creative thought to innovative output
2. Apply theories of creativity to practice	2.1. Evaluate the relevance and application of different theories and practices of creativity based on analysis

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ELEMENT	PERFORMANCE CRITERIA
	of ***own work and life experience***
	2.2. Analyse the ways in which different aspects of history, theory and other influences are applied, adapted or challenged in practice
	2.3. Assess the ways in which theories, thinking and practices about creativity may be applied that provide ***benefits to individuals***, ***businesses and the community***
3. Develop, articulate and debate own perspectives theories and practices of creativity	3.1. Take a critical approach to different theories and reflect on own ideas and responses
	3.2. Develop own ***substantiated positions*** in response to research and analysis
	3.3. Articulate own positions in a manner which demonstrates ***clarity of thought and conceptual understanding*** of different theories and thinking
	3.4. Debate own positions on creativity showing belief in own ideas and a willingness to remain open to new perspectives

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- critical thinking skills to analyse complex information and to develop and substantiate own positions and responses to theories and thinking around creativity
- communication skills to articulate and debate complex concepts
- literacy and problem solving skills to research information dealing with complex concepts and theories of creativity
- self-management skills to develop and substantiate own views and ideas.

Required knowledge

- different theories and concepts of creativity, including different historical perspectives and current and emerging thinking
- potential and actual benefits of creativity for individuals, businesses and communities
- relationship between theories of creativity and creativity in practice (in a particular work or broader social context).

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • conduct of at least one research project into past, current and emerging theories of creativity • development of substantiated positions on creativity and its application in response to own analysis and research • knowledge of different theories and thinking on creativity and its application in different social and work contexts.
Context of and specific resources for assessment	Assessment must ensure: • use of current and emerging sources of information and thinking on creativity.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of research undertaken by the candidate into theories and application of creativity • observation of the candidate participating in discourse and debate on theories of creativity and on the candidate's own positions and ideas.
Guidance information for assessment	

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Research techniques may include:	• analysis of consumer trends • desk research • finding style leaders • informal discussions • internet search • interviews • literature reviews • observation of creative workers processes and behaviours • personal experience • tracking trendsetters
New, ***emerging and alternative sources of ideas and thinking*** may include:	• component resourcing • consumer trends • current business theories • emerging government policy • emerging research • fashion/design trends • grazing hardware, electronics, junk, second hand goods etc. • individuals in any fields of endeavour • innovative organisations • international trends • new products and sub assembly components • social trends
Critical analysis may involve:	• adapting • analysing and evaluating actions and policies • challenging • clarifying issues, values and standards • comparing analogous situations • comparing and contrasting ideals with practice • comparing and evaluating beliefs, interpretations and theories • critical path process

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RANGE STATEMENT	
	• debate and discussion • developing criteria for evaluation • distinguishing relevant from irrelevant facts • examining and evaluating assumptions • exploring implications and consequences • generating and assessing solutions • ideational connecting of unrelated information • judging • leap of faith • making interdisciplinary connections • making plausible inferences and predictions • noting significant similarities and differences • obtuse connections • openness • questioning • reading and listening critically • reflecting
Range of theoretical perspectives and thinking may be:	• economic • environmental • geographic • heritage • historical • local, national, international • political • philosophical • social/cultural • style/design
Own work and life experience may include:	• evaluation of contexts in which creativity has flourished • observation of nature • observation of the man-made environment • observations of the ways people interrelate • reflection on own creative thinking and endeavours • reflection on own experience with any type of creative endeavour or creative thinking • workplace experience
Benefits to individuals, businesses and the community may include:	• adaptability • better individual and business relationships • capacity for innovation and invention

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RANGE STATEMENT	
	• curiosity • environmentally sustainable practices • greater social cohesion • high degree of value adding • improved productivity and profit • nimbleness of thought • psychological wellbeing of individuals and communities
Substantiated positions may be positions which are:	• grounded in appropriate research • result of rational and logical thought • supported by relevant information • subjected to the analysis of others (e.g. peer review)
Clarity of thought and conceptual understanding may be demonstrated by:	• ability to exchange and debate ideas with others • appropriate distillation of ideas to suit the required purpose • audience understanding • clear articulation of ideas

Unit Sector(s)

Unit sector	

Competency field

Competency field	Creativity and Innovation - Creative Thinking

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBCUS201B Deliver a service to customers

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCUS201A Deliver a service to customers

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to deliver all aspects of customer service at an introductory level. It includes creating a relationship with customers, identifying their needs, delivering services or products and processing customer feedback.

Application of the Unit

This unit applies to individuals who perform a range of routine tasks in the workplace using a limited range of practical skills and fundamental knowledge of customer service in a defined context under direct supervision or with limited individual responsibility.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Establish contact with customers	1.1 Acknowledge and greet ***customer*** in a professional, courteous and concise manner according to ***organisational requirements*** 1.2 Maintain personal dress and presentation in line with organisational requirements 1.3 Communicate using appropriate ***interpersonal skills*** to facilitate accurate and relevant exchange of information 1.4 Maintain sensitivity to customer specific needs and any cultural, family and individual differences 1.5 Establish rapport/relationship with customer and express a genuine interest in customer needs/requirements
2. Identify customer needs	2.1 Use appropriate questioning and active listening to determine customer needs 2.2 Assess customer needs for urgency to identify priorities for service delivery 2.3 Provide customer with information about available options for meeting customer needs and assist customer to identify preferred option/s 2.4 Identify personal limitations in addressing customer needs and seek assistance from ***designated persons*** where required
3. Deliver service to customers	3.1 Provide prompt customer service to meet identified needs according to organisational requirements 3.2 Provide information regarding problems and delays, and follow-up within appropriate timeframes as necessary 3.3 Communicate with customers in a clear, concise and courteous manner 3.4 Identify ***opportunities*** to enhance the quality of service and products, and take action to improve the service whenever

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	possible
4. Process customer feedback	4.1 Promptly recognise ***customer feedback*** and handle sensitively according to organisational requirements 4.2 Accurately record any feedback and communication between customers and the organisation according to organisational standards, policies and procedures 4.3 Identify any unmet customer needs and discuss suitability of other products/services 4.4 Support customers to make contact with other services according to organisational policies and procedures

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to convey meaning clearly, concisely and coherently
- literacy skills to communicate with customers and to develop required product knowledge
- numeracy skills to interpret customer requirements and to meet customer needs
- problem-solving skills to deal with customer enquiries or complaints
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities.

Required knowledge

- key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety (OHS)
- organisational policies and procedures relating to customer service and the customer service process.

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Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrating all stages of customer service interactions • responding to customer feedback • demonstrating a range of interpersonal skills • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of customer complaints and policies relating to customer service.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of customer service and communication techniques • review of information provided to customers about problems and delays, and customer follow-up • review of documentation recording feedback and communication between customers and the organisation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Customers may include:	• contacts from other organisations • external customers • internal customers • members of the public • patients • service users.
Organisational requirements may include:	• access and equity principles and practice • anti-discrimination and related policy • following OHS procedures for dealing with customers • legal and organisational policies, guidelines and requirements • quality and continuous improvement processes and standards • quality assurance and/or procedures manual.
Interpersonal skills may include:	• listening actively to what the customer is communicating • providing an opportunity for the customer to confirm their request • questioning to clarify and confirm customer needs • seeking feedback from the customer to confirm understanding of needs • summarising and paraphrasing to check understanding of customer's message • using appropriate body language.
Designated persons may include:	• manager, supervisor or team leader • more experienced personnel with specific knowledge or information • staff from other work areas with particular product or service knowledge.
Opportunities may include:	• advice about warranties, guarantees or support services • packaging options • pricing options • procedures for delivery of goods or service • provision of product knowledge • systems for recording complaints.

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Customer feedback may be about:	• damaged goods or delivery problems • delays • invoicing errors • quality of customer service • quality of service provision.

Unit Sector(s)

Stakeholder Relations – Customer Service

Custom Content Section

Not applicable.

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BSBCUS301B Deliver and monitor a service to customers

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Performance criteria amended so that the learner is not required to 'incorporate evidence of customer satisfaction in decision to modify products or services'. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCUS301A Deliver and monitor a service to customers

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to identify customer needs and monitor service provided to customers. Operators may exercise discretion and judgement using appropriate theoretical knowledge of customer service to provide technical advice and support to customers over either a short or long term interaction.

Application of the Unit

This unit applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Identify customer needs	1.1 Use ***appropriate interpersonal skills*** to accurately identify and clarify ***customer needs and expectations***
	1.2 Assess customer needs for urgency to determine priorities for service delivery according to ***organisational requirements***
	1.3 Use ***effective communication*** to inform customers about available choices for meeting their needs and assist in the selection of preferred options
	1.4 Identify limitations in addressing customer needs and seek appropriate assistance from ***designated individuals***
2. Deliver a service to customers	2.1 Provide prompt service to customers to meet identified needs in accordance with organisational requirements
	2.2 Establish and maintain appropriate rapport with customers to ensure completion of quality service delivery
	2.3 Sensitively and courteously handle ***customer complaints*** in accordance with organisational requirements
	2.4 Provide assistance or respond to customers with ***specific needs*** according to organisational requirements
	2.5 Identify and use available ***opportunities*** to promote and enhance services and products to customers
3. Monitor and report on service delivery	3.1 Regularly review customer satisfaction with service delivery using ***verifiable evidence*** according to organisational requirements
	3.2 Identify opportunities to enhance the quality of service and products, and pursue within organisational requirements
	3.3 Monitor procedural aspects of service delivery for effectiveness and suitability to customer requirements

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	3.4 Regularly seek customer feedback and use to improve the provision of products and services 3.5 Ensure reports are clear, detailed and contain recommendations focused on critical aspects of service delivery

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to identify trends and positions of products and services
- communication skills to monitor and advise on customer service strategies
- literacy skills to:
  - edit and proofread texts to ensure clarity of meaning and accuracy of grammar and punctuation
  - prepare general information and papers according to target audience
  - read and understand a variety of texts
- problem-solving skills to deal with customer enquiries or complaints
- technology skills to select and use technology appropriate to a task
- self-management skills to:
  - comply with policies and procedures
  - consistently evaluate and monitor own performance
  - seek learning opportunities.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - financial legislation
  - occupational health and safety (OHS)
- organisational policy and procedures for customer service including handling customer complaints
- service standards and best practice models
- public relations and product promotion
- techniques for dealing with customers, including customers with specific needs.

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Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying needs and priorities of customers • distinguishing between different levels of customer satisfaction • treating customers with courtesy and respect • responding to and reporting on, customer feedback • knowledge of organisational policy and procedures for customer service.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of customer complaints • examples of documents relating to customer service standards and policies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of reports on customer service delivery • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of customer service strategies.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Appropriate interpersonal skills may include:	• listening actively to what the customer is communicating • providing an opportunity for the customer to confirm their request • questioning to clarify and confirm customer needs • seeking feedback from the customer to confirm understanding of needs • summarising and paraphrasing to check understanding of customer message • using appropriate body language.
Customers may include:	• corporate customers • individual members of the organisation • individual members of the public • internal or external • other agencies.
Customer needs and expectations may include:	• accuracy of information • advice or general information • complaints • fairness/politeness • further information • making an appointment • prices/value • purchasing organisation's products and services • returning organisation's products and services • specific information.
Organisational requirements may include:	• access and equity principles and practice • anti-discrimination and related policy • defined resource parameters • goals, objectives, plans, systems and processes • legal and organisational policies, guidelines and requirements • OHS policies, procedures and programs • payment and delivery options • pricing and discount policies • quality and continuous improvement processes and

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	standards • quality assurance and/or procedures manuals • replacement and refund policy and procedures • who is responsible for products or services.
Effective communication may include:	• giving customers full attention • maintaining eye contact, except where eye contact may be culturally inappropriate • speaking clearly and concisely • using active listening techniques • using appropriate language and tone of voice • using clear written information/communication • using non-verbal communication e.g. body language, personal presentation (for face-to-face interactions) • using open and/or closed questions.
Designated individuals may include:	• colleagues • customers • line management • supervisor.
Customer complaints may include:	• administrative errors such as incorrect invoices or prices • customer satisfaction with service quality • damaged goods or goods not delivered • delivery errors • product not delivered on time • service errors • warehouse or store room errors such as incorrect product delivered.
Specific needs of customers may relate to:	• age • beliefs/values • culture • disability • gender • language • religious/spiritual observances.
Opportunities to promote and enhance services and products may include:	• extending time lines • packaging procedures • procedures for delivery of goods • returns policy • system for recording complaints • updating customer service charter.
Verifiable evidence may include:	• customer satisfaction questionnaires • audit documentation and reports

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	• quality assurance data • returned goods • lapsed customers • service calls • complaints.

Unit Sector(s)

Stakeholder Relations – Customer Service

Custom Content Section

Not applicable.

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BSBCUS401B Coordinate implementation of customer service strategies

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Performance criteria amended so that the learner is not required to 'incorporate evidence of customer satisfaction in decision to modify products or services'. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCUS401A Coordinate implementation of customer service strategies

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to advise on, carry out and evaluate customer service strategies, including the design of improvement strategies based on feedback. Operators may have responsibility to provide guidance or to delegate aspects of these tasks to others.

Application of the Unit

This unit applies to individuals with a broad knowledge of customer service strategies who contribute well developed skills in addressing customer needs and problems.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Advise on customer service needs	1.1 Clarify and accurately assess ***customer needs*** using appropriate ***communication techniques***
	1.2 Diagnose problems matching service delivery to ***customers*** and develop options for improved service within ***organisational requirements***
	1.3 Provide relevant and constructive advice to promote the improvement of customer service delivery
	1.4 Use ***business technology*** and/or ***online services*** to structure and present information on customer service needs
2. Support implementation of customer service strategies	2.1 Ensure customer service strategies and opportunities are promoted to ***designated individuals and groups***
	2.2 Identify and allocate available budget resources to fulfil customer service objectives
	2.3 Promptly action ***procedures to resolve customer difficulties*** and ***complaints*** within organisational requirements
	2.4 Ensure that decisions to implement ***strategies*** are taken in consultation with designated individuals and groups
3. Evaluate and report on customer service	3.1 Review client satisfaction with service delivery using verifiable data in accordance with organisational requirements
	3.2 Identify and report changes necessary to maintain service standards to designated individuals and groups
	3.3 Prepare conclusions and recommendations from verifiable evidence and provide constructive advice on future directions of

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	client service strategies 3.4 Maintain systems, records and reporting procedures to compare changes in customer satisfaction

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to
  - communicate effectively with personnel and clients at all levels
  - articulate customer service strategies
- interpersonal skills to:
  - build relationships with customers
  - establish rapport
- literacy skills to:
  - prepare general information and papers
  - read a variety of texts
  - write formal and informal letters according to target audience
- planning skills to develop implementation schedules
- problem-solving skills to diagnose organisational problems relating to customer services
- self-management skills to:
  - comply with policies and procedures
  - consistently evaluate and monitor own performance
  - seek learning opportunities.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - environmental issues
  - occupational health and safety (OHS)
- principles of customer service
- organisational business structure, products and services
- product and service standards and best practice models.

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Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying needs and priorities of the organisation in delivering services to customers • responding to and reporting on customer feedback • designing strategies to improve delivery of products and services • knowledge of the principles of customer service.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of customer complaints, feedback and strategies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation reporting changes necessary to maintain service standards • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of customer service techniques and strategies • review of systems, records and reporting procedures to compare changes in customer satisfaction.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Customer needs may relate to:	• accuracy of information • advice or general information • complaints • fairness/politeness • further information • making an appointment • prices/value • purchasing organisation's products and services • returning organisation's products and services • specific information.
Communication techniques may include:	• analysing customer satisfaction surveys • analysing quality assurance data • conducting interviews • consultation methods, techniques and protocols • making recommendations • obtaining management decisions • questioning • seeking feedback to confirm understanding • summarising and paraphrasing.
Customers may include:	• corporate customers • individual members of the organisation • individual members of the public • internal or external • other agencies.
Organisational requirements may include:	• access and equity principles and practice • anti-discrimination and related policy • confidentiality and security requirements • defined resource parameters • ethical standards • goals, objectives, plans, systems and processes • legal and organisational policies, guidelines and requirements • OHS policies, procedures and programs

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	• payment and delivery options • pricing and discount policies • quality and continuous improvement processes and standards • quality assurance and/or procedures manuals • replacement and refund policy and procedures • who is responsible for products or services.
Business technology may include:	• answering machine • binder • computer • fax machine • photocopier • printer • shredder • telephone.
Online services may include:	• access to product database by customers online • access to purchase, delivery and account records • contact centre • online ordering • online payments • online registration • quick/reasonable response • two-way communication online.
Designated individuals and groups may include:	• colleagues • committee • customers • external organisation • line management • supervisor.
Procedures to resolve customer difficulties may include:	• external agencies (e.g. Ombudsman) • item replacement • referrals to supervisor • refund of monies • review of products or services • using conflict management techniques.

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Customer complaints may include:	• administrative errors such as incorrect invoices or prices
	• customer satisfaction with service quality
	• damaged goods or goods not delivered
	• delivery errors
	• products not delivered on time
	• service errors
	• specific e-business problems and issues:
	  • difficulty accessing services
	  • inactive links
	  • not appreciating differing hardware and software
	  • services not available
	  • supply errors such as incorrect product delivered
	  • time taken to access services
	  • unfriendly website design
	  • website faults
	• warehouse or store room errors such as incorrect product delivered.

Customer service ***strategies*** may include:	• courtesy/politeness • delivery times • merchandise characteristics • price offers • product/refund guarantees • product/service availability.

Unit Sector(s)

Stakeholder Relations – Customer Service

Custom Content Section

Not applicable.

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BSBCUS402B Address customer needs

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCUS402A Address customer needs

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to manage the ongoing relationship with a customer, which includes assisting the customer to articulate their needs, meeting customer needs and managing networks to ensure customer needs are addressed. The customer relationship would typically involve direct interaction a number of times over an extended period.

This unit is appropriate to workers who are expected to have detailed product knowledge in order to recommend customised solutions. They would be expected to apply organisational procedures and be aware of, and apply as appropriate, broader factors involving ethics, industry practice and relevant government policies and regulations.

Application of the Unit

This unit applies to workers required to be familiar with a product and service that varies widely and is capable of significant customisation.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Assist customer to articulate needs	1.1 Ensure ***customer*** needs are fully explored, understood and agreed 1.2 Explain and match available services and products to customer needs 1.3 Identify and communicate ***rights and responsibilities of customers*** to the customer as appropriate
2. Satisfy complex customer needs	2.1 Explain possibilities for meeting customer needs 2.2 Assist customers to evaluate service and/or product options to satisfy their needs 2.3 Determine and prioritise preferred actions 2.4 Identify potential areas of difficulty in customer service delivery and take appropriate actions in a positive manner
3. Manage networks to ensure customer needs are addressed	3.1 Establish ***effective regular communication*** with customers 3.2 Establish, maintain and expand relevant networks to ensure appropriate referral of customers to products and services from within and outside the organisation 3.3 Ensure procedures are in place to ensure that decisions about targeting of customer services are based on up-to-date information about the customer, and the ***products and services*** available 3.4 Ensure procedures are put in place to ensure that referrals are based on the matching of the assessment of customer needs and availability of products and services 3.5 Maintain records of customer interaction in accordance with

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	organisational procedures

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to relate to people from diverse backgrounds and people with diverse abilities.
- information management skills to summarise information verbally and non-verbally
- literacy and numeracy skills to:
  - interpret product and service features or sales data
  - read a variety of texts to prepare general information and papers
  - summarise information obtained from a variety of verbal and non-verbal sources
  - write formal and informal text
- numeracy skills to analyse data, and to compare time lines and promotional costs against budgets
- problem-solving skills to develop solutions unique to a customer
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - environmental issues
  - occupational health and safety
- organisational procedures and standards for customer service relationships
- detailed product and service knowledge which may:
  - be of significant breadth so as to propose alternative products and services, or
  - of significant depth so as to propose variations within a limited product and service range.

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Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • assisting customers to articulate their needs • documenting processes used and customer satisfaction with the products/services offered • assisting customers to address their needs.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of products/services and promotional strategies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation prioritising preferred actions • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • assessment of written reports • evaluation of communication established with customers • review of customer interaction records.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Customers may include:	• customers with routine or specific requests • in person, computer-based and telephone customers • internal and external customers • people from a range of social, cultural or ethnic backgrounds • people who may be unwell, drug affected or emotionally distressed • people with varying physical and mental abilities • regular and new customers.
Rights and responsibilities of customers may include:	• fulfilment of external obligations • informed consent.
Effective regular communication may include:	• giving customers full attention • handling sensitive and confidential issues • maintaining eye-contact (for face-to-face interactions), except where eye-contact may be culturally inappropriate • speaking clearly and concisely • using active listening techniques • using appropriate language and tone of voice • using clearly written information/communication • using non-verbal communication e.g. body language, personal presentation (for face-to-face interactions) • using open and/or closed questions.
Products and services may include:	• either products or services • goods • ideas • infrastructure • private or public sets of benefits.
Organisational procedures may include:	• procedural manuals • quality systems, standards and guidelines.

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Unit Sector(s)

Stakeholder Relations – Customer Service

Custom Content Section

Not applicable.

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BSBCUS403B Implement customer service standards

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBCUS403A Implement customer service standards.

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to contribute to quality customer service standards, and to support personnel to implement customer service standards and systems within the organisation. Operators undertaking this unit would have a detailed knowledge of, and experience in, customer service systems and procedures.

Application of the Unit

This unit applies to frontline managers, including team leaders and supervisors, who have responsibility for seeing that a customer service system and customer service standards are implemented.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Contribute to quality customer service standards	1.1 Access, interpret, apply and monitor ***customer*** service standards in the workplace according to ***organisational standards, policies and procedures*** 1.2 Make contributions to the development, refinement and improvement of customer service standards, policies and processes
2. Implement customer service systems	2.1 Encourage all personnel to consistently implement customer service systems 2.2 Review customer feedback in consultation with appropriate personnel and analyse when improving work practices 2.3 Identify ***customer service problems*** and make adjustments to ensure continued service quality 2.4 Communicate adjustments in service delivery to all those involved, within appropriate timeframes 2.5 Coordinate and manage delivery of services and products to ensure they effectively and efficiently meet agreed quality standards
3. Implement team customer service standards	3.1 Plan and implement team and work activities to meet customer needs and expectations, and to minimise inconvenience 3.2 Identify resources required to undertake team tasks while meeting required customer service levels

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

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Required skills

- communication skills to:
  - direct others with regard to customer services standards
  - explain the system and standards to the work team
- information management skills to summarise information verbally and non-verbally
- literacy and numeracy skills to:
  - interpret product and service features or sales data
  - read a variety of texts to prepare general information and papers
  - summarise information obtained from a variety of verbal and non-verbal sources
  - write formal and informal text
- numeracy skills to analyse data, and to compare time lines and promotional costs against budgets
- problem-solving skills to:
  - address problems and ensure service standards are met
  - develop solutions unique to a customer
  - modify customer service standards when required
- self-management skills to:
  - comply with policies and procedures
  - seek learning and development opportunities.

Required knowledge

- detailed product and service knowledge
- models of customer service
- relevant organisational procedures and standards for customer service relationships.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • compliance with customer service system and standards • recommendations about how the standards can be improved or adapted to better meet the needs of the organisation and the customers • knowledge of customer service models.

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Context of and specific resources for assessment	Assessment must ensure: • access to workplace documents.
Method of assessment	The following assessment methods are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge of relevant organisational procedures and standards for customer service relationships • evaluation of documentation reviewing customer feedback • review of documentation identifying customer service problems • review of team and work activities plan.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCUS401B Coordinate implementation of customer service strategies • BSBCUS402B Address customer needs.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Customers may include:	• customers with routine or special requests • internal and external customers • people from a range of social, cultural or ethnic backgrounds • people who may be unwell, drug affected or emotionally distressed

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	• people with varying physical and mental abilities • regular and new customers.
Organisational standards, policies and procedures may include:	• continuous quality improvement cycle – plan/do/check/act • procedural manuals • product and service manuals, labels, instructions • quality systems, standards and guidelines • requirements for staff appearance and presentation.
Customer service problems may include:	• breakages or faults • damaged stock • delays in delivery of products or services • missing parts or components • poor service • provision of poor advice or information.

Unit Sector(s)

Stakeholder Relations – Customer Service

Custom Content Section

Not applicable.

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BSBCUS501C Manage quality customer service

Modification History

Release	Comments
Release 1	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures.

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to develop strategies to manage organisational systems that ensure products and services are delivered and maintained to standards agreed by the organisation.

Operators may have staff involved in delivering customer service and are responsible for the quality of their work. In many instances the work will occur within the organisation's policies and procedures framework. At this level, the exercise of considerable discretion and judgement, using a range of problem solving and decision making strategies, will be required.

Application of the Unit

Many managers are involved in ensuring that products and services are delivered and maintained to standards agreed by the organisation.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Plan to meet internal and external customer requirements	1.1 Investigate, identify, assess, and include the needs of ***customers*** in planning processes 1.2 Ensure plans achieve the ***quality***, time and cost specifications agreed with customers
2. Ensure delivery of quality products and services	2.1 Deliver ***products and services*** to customer specifications within organisation's business plan 2.2 Monitor team performance to consistently meet the organisation's quality and delivery standards 2.3 Assist colleagues to overcome difficulty in meeting customer service standards
3. Monitor, adjust and review customer service	3.1 Develop and use ***strategies*** to monitor progress in achieving product and/or service targets and standards 3.2 Develop and use strategies to obtain customer feedback to improve the provision of products and services 3.3. Develop, procure and use ***resources*** effectively to provide quality products and services to customers 3.4 Make decisions to overcome problems and to adapt customer services, products and service delivery in consultation with appropriate individuals and groups 3.5 Manage records, reports and recommendations within the organisation's systems and processes

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

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Required skills

- analytical skills to identify trends and positions of products and services
- communication skills to:
  - coach and mentor staff and colleagues
  - monitor and advise on customer service strategies
- literacy skills to:
  - edit and proofread texts to ensure clarity of meaning and accuracy of grammar and punctuation
  - prepare general information and papers according to target audience
  - read and understand a variety of texts
- problem-solving skills to:
  - deal with customer enquiries or complaints
  - deal with complex and non-routine difficulties
- technology skills to select and use technology appropriate to a task
- self-management skills to:
  - comply with policies and procedures
  - consistently evaluate and monitor own performance
  - seek learning opportunities.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - Australian consumer law
  - ethical principles
  - codes of practice
  - privacy laws
  - financial legislation
  - occupational health and safety (OHS)
- organisational policy and procedures for customer service including handling customer complaints
- service standards and best practice models
- public relations and product promotion
- techniques for dealing with customers, including customers with specific needs
- techniques for solving complaints including the principles and techniques involved in the management and organisation of:
  - customer behaviour
  - customer needs research
  - customer relations
  - ongoing product and/or service quality

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- problem identification and resolution
- quality customer service delivery
- record keeping and management methods
- strategies for monitoring, managing and introducing ways to improve customer service relationships
- strategies to obtain customer feedback.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • plans, policies or procedures for delivering quality customer service • demonstrated techniques in solving complex customer complaints and system problems that lead to poor customer service • knowledge of techniques for solving complaints.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of performance in role plays • evaluation of leadership, supervision, coaching and mentoring used to assist colleagues to overcome difficulty in meeting customer service standards • review of strategies developed and used to monitor progress in achieving product and/or service targets and standards • review of records, reports and recommendations about managing customer service.

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Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Customers may be:	• Board members • clients, purchasers of services • co-workers, peers and fellow frontline managers • members of the general public who make contact with the organisation, such as prospective purchasers of services • potential funding bodies • supervisors • suppliers of goods and services and contractors providing goods and services.
Quality may refer to:	• characteristics of a product, system, service or process that meet the requirements of customers and interested parties.
Products and services may include:	• either products or services • goods • ideas • infrastructure • private or public sets of benefits.
Strategies may refer to:	• databases and other controls to record and compare data over time • electronic feedback mechanisms using intranet, internet and email • feedback forms and other devices to enable communication from customers • long-term or short-term plans for monitoring achievement and evaluating effectiveness • policies and procedures • questionnaires, survey and interviews • training and development activities.

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Resources may include:	• buildings/facilities • equipment • finance • information • people • power/energy • technology • time.

Unit Sector(s)

Stakeholder Relations – Customer Service

Custom Content Section

Not applicable.

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BSBDES201A Follow a design process

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to follow a design process at a basic level. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to any individual who follows a design process to respond to specific issues or challenges, including product and service requirements arising from particular business or community needs. The unit acknowledges the need to encourage the development of skills, which are sometimes called 'design thinking' or 'design consciousness'. In essence, the unit is about purposeful problem solving - defining the challenge, coming up with ideas, working with others to develop ideas, reflecting on progress, presenting an idea so it can be implemented and, of course, evaluating whether an idea has met the original challenge. Designers use the processes described in this unit but at a much more sophisticated and complex level. This unit is not about being a designer.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Clarify the challenge	1.1. Confirm the ***nature and scope of the challenge*** with ***stakeholders*** 1.2. Agree on specific objectives with ***stakeholders*** 1.3. Identify any ***constraints*** that may impact on the design process 1.4. Identify and source ***relevant supporting information and assistance***
2. Explore different ideas and solutions	2.1. Generate a range of ideas to respond to the challenge 2.2. Explore ***different options and ideas*** for meeting objectives 2.3. Involve others in the process of developing ideas and solutions
3. Select and present a	3.1. Reflect on different ideas and feedback, and select a

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ELEMENT	PERFORMANCE CRITERIA
solution	preferred solution 3.2. Summarise the key ideas in the solution and present to stakeholders in ***appropriate format*** 3.3. Obtain any required approvals to take the solution to the next stage
4. Implement the solution	4.1. Schedule key tasks and organise ***resources to support implementation*** 4.2. Carry out ***testing***, ***prototyping or trialling*** of the proposed solution 4.3. Maintain any required ***documentation*** 4.4. Identify problems and seek ***advice and guidance*** from others
5. Evaluate the solution	5.1. Check the success of the solution based on original objectives 5.2. Seek feedback from appropriate stakeholders 5.3. Review both the solution and the process undertaken to develop the solution as part of an ongoing learning process

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to liaise with others, to share ideas, and to present information and ideas clearly and concisely
- creative thinking skills to generate ideas in response to a defined problem or need in a familiar context
- literacy skills to analyse and interpret information dealing with concepts and ideas from own area of work
- problem-solving skills to identify problems and to work with others to develop solutions
- self-management skills to take responsibility for own work as part of an overall collaborative process.

Required knowledge

- context for the challenge, including any specific factors that impact on work

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REQUIRED SKILLS AND KNOWLEDGE
• creative thinking techniques that can be used to generate ideas in any context • key features and steps in the design process as a way of thinking and solving problems • legal framework that impacts on activities in a particular context • potential sources of information for new ideas, relevant to the specific context.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • active participation in a project which uses the design process to develop solutions to a given challenge • effective communication skills to be a member of a collaborative team • knowledge of the design process, and how it can be used in developing solutions to different issues and challenges.
Context of and specific resources for assessment	Assessment must ensure: • access to materials, tools and equipment required to implement solutions in the given work context • interaction with others to reflect the collaborative nature of the design process.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • direct observation of the candidate participating in collaborative processes • evaluation of documentation maintained by the candidate to support different ideas • evaluation of a presentation made by the candidate

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EVIDENCE GUIDE	
	outlining proposed solutions and processes used to develop those solutions • oral or written questioning to assess knowledge of parameters and context for work in a given industry context.
Guidance information for assessment	The design process does not occur in isolation. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other technical or specialist units from particular areas of work.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Nature and scope of the challenge could be very varied, and may relate to new or improved:	• applications of materials or equipment • processes • products or services • systems • uses of technology
Stakeholders may include:	• client • end users • friends and family • supervisor or manager • work colleagues (working in the same or different areas)
Constraints may relate to:	• availability of materials, equipment or tools • boundaries about what can and cannot be changed • legal restrictions • time and budget
Relevant supporting information	• drawings, specifications or other technical data

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RANGE STATEMENT	
and assistance may include:	• ideas from colleagues • industry associations or organisations • personal experience • policy and procedures manuals • print or electronic media (including internet) • reference manuals • technical experts

Different options and ideas may be generated by:	• brainstorming:
	  • stop and go
	  • sequencing
	  • buzz session
	  • bulletin board
	  • computer-aided
	• daydreaming and mental wandering
	• Edward de Bono's six thinking hats
	• ego alter or heroes
	• graphic organisers:
	  • visual maps
	  • webbing
	  • concept fans
	• lateral thinking games
	• making associations
	• mind mapping
	• morphological analysis
	• storytelling
	• sub-culture surfing
	• trigger words
	• use of metaphors and analogies
	• vision circles
	• visualisation
	• wishful thinking
	• word salads

Appropriate format may be:	• checklists • digital presentation • drawings/sketches • models • plans • verbal presentation
Resources to support	• equipment

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RANGE STATEMENT	
implementation may include:	• financial resources • human resources • information technology support • materials • tools
Testing*, *prototyping or trialling may involve:	• creating a physical model or sample • testing the solution against different scenarios • using a small group to test the solution
Documentation may include:	• diary showing progress of work • progress reports • records of communication (e.g. emails) • working drawings
Advice and guidance may involve:	• facilitating access to networks or contacts • facilitating access to resources • providing technical expertise

Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

Co-requisite units

Co-requisite units		

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BSBDES202A Evaluate the nature of design in a specific industry context

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to evaluate the nature and role of design in a particular industry context. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Design occurs in all industries and increasingly, quality design is considered a key factor in building organisational and industry capacity and competitiveness. This unit applies to individuals working in any context, who need to develop a basic appreciation and knowledge of the way that design works in a particular industry, and of its potential impacts on industry and individual work practice.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Source information on design in a given industry context	1.1. Investigate the ***nature***, ***history***, ***role and importance of design*** in the industry 1.2. Evaluate the roles played by designers and ***other contributors*** in the design process 1.3. Source information on the ***impacts of technology*** on design in the industry
2. Examine links between design and own work	2.1. Investigate ***impacts of design on own work*** 2.2. Consider ***role of individual workers*** across the industry in affecting future design directions
3. Keep up to date with industry design trends	3.1. Identify and access ***opportunities to maintain currency of knowledge*** about industry design trends 3.2. Evaluate how design trends affect the overall industry and the way it operates 3.3. Share information and pro-actively discuss emerging trends with work colleagues 3.4. Identify trends that will impact on own work and

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ELEMENT	PERFORMANCE CRITERIA
	seek opportunities to develop appropriate skills

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to discuss design in a particular industry context with others • research and literacy skills to source and interpret a wide range of information sources on design in a particular industry context • self-management and learning skills to take responsibility for identifying and accessing professional development opportunities.
Required knowledge
• consumer/end-user expectations • current and emerging technologies and their effects on design in the industry • current and past designers of influence in the industry • current trends in use of design in a given industry context • different definitions of design, and the differences and similarities between design and product development • major design trends in the industry • role of design in a given industry context.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • sourcing and interpreting a range of information sources on design and applying concepts to own work situation

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EVIDENCE GUIDE	
	• knowledge of design in a specific industry context, and its impact on individual work practice.
Context of and specific resources for assessment	Assessment must ensure: • access to sources of information on design in a specific industry context.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of the nature, history, role and importance of design in a specific industry context.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Nature, ***history***, ***role and importance of design*** may relate to:	• changing nature of consumer expectations • design and the role it plays in overall industry development, both locally and overseas • design as competitive edge for individual organisations • historical development of design in the industry • important design influences in the industry • links between design and legislation (e.g. specific requirements such as emission controls for vehicles, safety features of buildings, solar protection for clothing)

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RANGE STATEMENT	
Other contributors may be those involved in:	• marketing • operations • product development • production
Impacts of technology may include:	• changes in work structures • changing staff demographics • different relationships with other industries (e.g. information technology) • different staff requirements • location changes to accommodate different technologies
Impacts of design on own work may include potential changes to:	• cost structures and resulting work practices • equipment • materials • own roles and responsibilities • procedures • skill requirements
Role of individual workers may relate to:	• adapting processes for greater efficiency • developing design ideas based on operational knowledge and experience • pro-actively making suggestions about new ways of doing things • providing feedback on design concepts
Opportunities to maintain currency of knowledge may include:	• attendance at seminars or other professional development opportunities • conferences • exhibitions and trade shows • formal training • industry associations or organisations • industry social functions • master classes • media (including internet) • reference manuals • unions or employer bodies

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

Co-requisite units

Co-requisite units		

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BSBDES301A Explore the use of colour

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to explore the use of colour and to apply colour theory. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to any individual whose work involves the effective use of colour, and who needs to understand the basics about the way colours work. Artists, designers, photographers, lighting technicians, digital media specialists and visual merchandisers are just a few examples of people who need these skills.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Source information on colour and colour theory	1.1. Identify and access ***sources of information on colour and colour theory*** 1.2. Evaluate and collate information to build a knowledge of colour and its application in different contexts
2. Experiment with colour	2.1. Test different colours and colour combinations through ***experimentation*** 2.2. Use own ideas as a way of testing, challenging or confirming colour theory 2.3. Ensure safe use of ***materials***, ***tools and equipment*** during experimentation with colour
3. Communicate concepts and ideas through use of colour	3.1. Investigate how colour might be used to communicate a particular ***idea or concept*** 3.2. Select materials, tools and equipment relevant to the idea or concept 3.3. Apply colour in a way that communicates the concept or idea based on own knowledge of colour and colour theory 3.4. Review and reflect on own use of colour and what it communicates 3.5. Seek and obtain feedback from others about the way colour has been used and its success in communicating the concept or idea

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ELEMENT	PERFORMANCE CRITERIA
	3.6. Present and store work any ***samples*** in a way which takes account of the need for professional presentation and potential relevance for future work

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to read and interpret information about colour and colour theory • numeracy skills to calculate quantities and proportions of different colours • visual literacy skills to make judgements about the way that different colours work together and in conjunction with other elements.
Required knowledge
• colour attributes and colour relationships • different colour theories and their applications to different contexts • emotional, cultural and situational aspects of colour • individual interpretation and choice in relation to the use of colour, and the potential limitations of theory • materials, tools and equipment required to experiment with colour in relevant contexts • ways in which other practitioners use colour in their work.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • effective use of colour to communicate a concept or idea

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EVIDENCE GUIDE	
	• knowledge of colour theory, the effects of colour and its potential use in different contexts.
Context of and specific resources for assessment	Assessment must ensure: • access to materials, resources and equipment needed to apply colour in the relevant work context.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of colour samples produced by the candidate to communicate a concept or idea • oral or written questioning to assess knowledge of colour theory and use of colour by different practitioners.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Sources of information on colour and colour theory may include:	• anecdotal sources, personal observation • art and design work • books and magazines • characteristics of materials, for example paints, pigments • scientific texts • web-based resources
Experimentation may involve playing with:	• application of light, for example in a theatrical context

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RANGE STATEMENT	
	• colour attributes in hue, chroma, value • colour grading • colour models (emotional, physical and psychological effects of colour) • colour scales • colour schemes • effective colour relationships, for example harmonies and discords
Materials, ***tools and equipment*** may include:	• air brushes • brushes • cardboard • digital equipment • fabrics/textiles/plastics • glue • gouache, watercolour, acrylic • hand tools • light sources/equipment • lighting gels • measuring tools • pastels, colour pencils, crayons • range of papers • receptacles • rulers • software • sponges • spray gun
Idea or concept to be communicated may relate to a huge range of activities such as:	• advertising and promotion • artistic works • exhibitions or events • fashion designs • interactive digital media products • interior designs • jewellery design • lighting designs • object or product design • sign making • theatrical props, sets or scenic art
Samples may be:	• colour wheels • colour swatches • constructed

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RANGE STATEMENT	
	• digital output • drawn, painted, printed • photographs • sample boards • transitory, for example natural and artificial lighting effects

Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

Co-requisite units

Co-requisite units		

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BSBDES302A Explore and apply the creative design process to 2D forms

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to explore and creatively apply the design process to the development of 2 dimensional (2D) forms. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who apply the creative design process to the development of 2-dimensional forms. The unit underpins many other specialised design units.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Source information on 2-dimensional design	1.1. Identify and access relevant ***sources of information*** on 2-dimensional design 1.2. Evaluate and collate information to build a knowledge of 2-dimensional design
2. Explore the creative design process for 2-dimensional forms	2.1. Use ***creative thinking techniques*** to generate a range of ideas and options 2.2. Use ***experimentation*** to explore and challenge a range of different ideas 2.3. Challenge assumptions, reflect on ideas and refine approaches 2.4. Consciously change perspective, and evaluate ideas and situations in new ways
3. Communicate concepts or ideas through application of design processes to 2-dimensional forms	3.1. Investigate and reflect on how a particular ***concept or idea*** might be communicated in a 2-dimensional form 3.2. Select ***materials***, ***tools and equipment*** relevant to the realisation of the concept or idea 3.3. Apply a creative design process to produce a range of 2-dimensional concept realisations 3.4. Reflect on own application of design process and success in communicating the concept or idea 3.5. Seek and obtain feedback from others about the 2-dimensional form and its success in

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ELEMENT	PERFORMANCE CRITERIA
	communicating the concept or idea 3.6. Present and store ***concept realisations or samples*** in a format which takes account of the need for professional presentation and potential value for future work

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to explain ideas and to have discussions about design concepts with others • literacy skills to read and interpret information about 2-dimensional design • visual literacy skills to make judgements about the application of the design process to 2-dimensional forms.
Required knowledge
• copyright, moral rights, intellectual property issues and legislation, and their impact on aspects of design • creative thinking techniques that can be used as part of the design process • elements and principles of design as applied to 2-dimensional forms • materials, tools and equipment required for the design of 2-dimensional forms in the relevant work context • notion of individual interpretation and choice within the design process • particular challenges and issues in the design of 2-dimensional forms.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • production of a range of samples or concept realisations which show the creative application of processes to 2-dimensional forms • knowledge of the design process as it applies to 2-dimensional work.
Context of and specific resources for assessment	Assessment must ensure: • access to the materials resources and equipment needed to apply design processes to 2-dimensional forms.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of samples or concept realisations produced by the candidate and interrogation of the creative process used • oral or written questioning to assess knowledge of 2-dimensional design.
Guidance information for assessment	The design process does not occur in isolation. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Sources of information may include:	• anecdotal sources, personal observation • art and design work • books and magazines

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RANGE STATEMENT	
	• natural and manufactured forms, objects and/or structures • optics, including single and multiple vanishing points • scientific texts • web-based resources

Creative thinking techniques may include:	• brainstorming:
	  • bulletin board
	  • buzz session
	  • computer-aided
	  • sequencing
	  • stop and go
	• daydreaming and mental wandering
	• Edward de Bono's six thinking hats
	• ego alter or heroes
	• graphic organisers:
	  • concept fans
	  • visual maps
	  • webbing
	• lateral thinking games
	• making associations
	• mind mapping
	• morphological analysis
	• storytelling
	• sub-culture surfing
	• trigger words
	• use of metaphors and analogies
	• vision circles
	• visualisation
	• wishful thinking
	• word salads

Experimentation may involve consideration of:	• contrast • direction • exploring tonal range to produce illusion of 3-dimensionality • harmony • linear perspective • mark making • modelling volume through marks and tone • pattern

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RANGE STATEMENT	
	• positive and negative shape • proportion • rhythm • shape • size • texture • tone
Concept or idea to be communicated may relate to a range of activities such as:	• advertising and promotion • artistic works • exhibitions or events • fashion designs • interactive digital media products • interior designs • sign making
Materials, ***tools and equipment*** may include:	• cardboard • air brushes • cutting blades • digital equipment • found materials • glue • inks and washes • markers • measuring tools • pencils • pens and nibs • range of brushes • range of papers • receptacles • relevant and current software • rulers • scissors • spatulas • sponges • spray guns
Concept realisations or samples may be:	• digital output • drawn, painted, printed, collaged • photographs

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

Co-requisite units

Co-requisite units		

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BSBDES303A Explore and apply the creative design process to 3D forms

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to explore and creatively apply the design process to the development of 3 dimensional (3D) forms. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who apply the creative design process to the development of 3-dimensional forms. The unit underpins many other specialised design units.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Source information on 3-dimensional design	1.1. Identify and access relevant ***sources of information*** on 3-dimensional design 1.2. Evaluate and collate information to build a knowledge of 3-dimensional design
2. Explore the creative design process for 3-dimensional forms	2.1. Use ***creative thinking techniques*** to generate a range of ideas and options 2.2. Use ***experimentation*** to explore and challenge a range of different ideas 2.3. Challenge assumptions, reflect on ideas and refine approaches 2.4. Consciously change perspective, and evaluate ideas and situations in new ways
3. Communicate concepts or ideas through application of design processes to 3-dimensional forms	3.1. Investigate and reflect on how a particular ***concept or idea*** might be communicated in a 3-dimensional form 3.2. Select ***materials***, ***tools and equipment*** relevant to the realisation of the concept or idea 3.3. Apply a creative design process to produce a range of 3-dimensional concept realisations 3.4. Reflect on own application of design process and success in communicating the concept or idea 3.5. Seek and obtain feedback from others about the 3-dimensional form and its success in

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ELEMENT	PERFORMANCE CRITERIA
	communicating the concept or idea 3.6. Present and store ***concept realisations or samples*** in a format which takes account of the need for professional presentation and potential value for future work

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to explain ideas and to have discussions about design concepts with others • literacy skills sufficient to read and interpret information about 3-dimensional design • visual literacy skills to make judgements about the application of the design process to 3-dimensional forms.
Required knowledge
• copyright, moral rights, intellectual property issues and legislation, and their impact on aspects of design • creative thinking techniques that can be used as part of the design process • elements and principles of design as applied to 3-dimensional forms • materials, tools and equipment required for the design of 3-dimensional forms in the relevant work context • notion of individual interpretation and choice within the design process • particular challenges and issues in the design of 3-dimensional forms • relationships between form and space.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • production of a range of samples or concept realisations which show the creative application of the processes to 3-dimensional forms • knowledge of the design process as it applies to 3-dimensional work.
Context of and specific resources for assessment	Assessment must ensure: • access to the materials resources and equipment needed to apply design processes to 3-dimensional forms.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of samples or concept realisations produced by the candidate and interrogation of the creative process used • oral or written questioning to assess knowledge of 3-dimensional design.
Guidance information for assessment	The design process does not occur in isolation. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Sources of information may	• anecdotal sources, personal observation

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RANGE STATEMENT	
include:	• art and design work • books and magazines • natural and manufactured forms, objects and/or structures • optics, including single and multiple vanishing points • scientific texts • web-based resources

Creative thinking techniques may include:	• brainstorming:
	  • bulletin board
	  • buzz session
	  • computer-aided
	  • sequencing
	  • stop and go
	• daydreaming and mental wandering
	• Edward de Bono's six thinking hats
	• ego alter or heroes
	• graphic organisers:
	  • concept fans
	  • visual maps
	  • webbing
	• lateral thinking games
	• making associations
	• mind mapping
	• morphological analysis
	• storytelling
	• sub-culture surfing
	• trigger words
	• use of metaphors and analogies
	• vision circles
	• visualisation
	• wishful thinking
	• word salads

Experimentation may involve consideration of:	• bending • binding • cutting • folding • mass • moulding and modelling

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RANGE STATEMENT	
	• pasting and taping • positive and negative forms • proportion • relationships of form to form and form to space • rhythm • shape • size • stitching • stretching • symmetry, asymmetry, balance • tone • twisting
Concept or idea to be communicated may relate to a range of activities such as:	• advertising and promotion • artistic works • exhibitions or events • fashion designs • interactive digital media products • interior designs • sign making
Materials, tools and equipment may include:	• brushes • buckets and containers • clamps • clays and other plastic compounds (plasticene, plaster) • cutting tools (scissors, knives blades) • drill • fibres, tape, string • foamcore, polystyrene • found materials • glue • hammer • measuring tools • nails, screws, wire • papers, cardboard and paper pulp • pliers • recycled materials • relevant and current hardware and software • saw • shaping tools (surform blades, planers, modelling and carving tools)

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RANGE STATEMENT	
	• wood, metal, fabric, plastic
Concept realisations or samples may be:	• digital output • fabricated and constructed works • models • prototypes

Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

Co-requisite units

Co-requisite units		

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BSBDES304A Source and apply design industry knowledge

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to source, apply and update a general knowledge of the design industry. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who need to source and apply knowledge on the design industry to support professional design practice. The unit acknowledges the concept of a design industry and design as a discrete profession. BSBDES202A Evaluate the nature of design in a specific industry context is more appropriate for those involved in design related activity as part of a broader job role. Design is a practice based on problem solving, aesthetics, materials and processes. It refers to professional design of work involving two dimensions and forms in space which respond to a brief, and may relate to the design of digital media, graphics, illustrative work, industrial designs, events/exhibits, fashion, jewellery, fashion accessories, furniture, furnishing, interior or urban design.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Source and apply information on the structure and operation of the design industry	1.1. Identify and access ***information on the design industry*** and professional design practice 1.2. Use and analyse knowledge of the design industry appropriately, to inform own design practice and work
2. Source and apply knowledge on employment obligations and opportunities that impact on designers	2.1. Obtain information on ***employment obligations and opportunities*** in the design industry 2.2. Apply knowledge of employment obligations and opportunities appropriately, within day-to-day work activities
3. Seek information on new design technology	3.1. Correctly identify sources of ***information on new technology*** affecting different areas of design practice

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ELEMENT	PERFORMANCE CRITERIA
	3.2. Investigate relevant technologies to assist effective work performance
4. Update industry knowledge	4.1. Identify and use a range of ***opportunities to update knowledge of the design industry*** and monitor current ***issues of concern*** to the industry 4.2. Share updated knowledge with colleagues and peer group as appropriate, and incorporate into day-to-day work activities
5. Apply information on ethical and legal work practices	5.1. Source ***information on ethical and legal work practices*** in the context of design 5.2. Share updated knowledge on ethical and legal work practice in day-to-day work activities

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to share industry information in day-to-day activities
- learning and self-management skills to take responsibility for ongoing learning and development
- research and literacy skills to source and interpret industry information.

Required knowledge

- concept of a design industry, what it means, the typical questions and issues about whether a design industry exists, and how a design industry relates to other industries
- copyright, moral rights and intellectual property issues and legislation, and their impact on the design industry
- current and emerging technologies used within the design industry
- design industry including different sectors and their interrelationships, plus the historical development of the industry
- etiquette and ethics as they apply to key design disciplines within the industry
- global nature of design activity
- impact of convergence in the design industry
- key design disciplines, how they interrelate and key roles and responsibilities
- key design industry terminology
- nature, role and functions of unions and employer associations, including rights

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REQUIRED SKILLS AND KNOWLEDGE
and responsibilities of employers and employees • obligations of employees, including attendance, ethical behaviour, taking directions, confidentiality, work performance, safety and care • obligations of employers, including safe system of work and non-discrimination • sources of information on the design industry and ways of maintaining current industry knowledge.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • knowledge of the design industry, design as a profession and the relationship between design and other industries • application of industry knowledge to work activities, maximising effective performance • knowledge of ways to maintain currency in design industry trends and practice.
Context of and specific resources for assessment	Assessment must ensure: • access to sources of information on the design industry.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of different aspects of the design industry.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Information on the design industry should relate to:	• different sectors, and products and services available
	• economic and social significance of the industry
	• industry structure
	• prominent design practitioners, companies and practices
	• relationship between design and allied industries such as:
	  • film, television, radio, digital media
	  • journalism
	  • manufacturing
	  • music
	  • photoimaging
	  • retail
	  • scientific/medical
	  • sport
	  • tourism
	  • visual arts and craft

Employment obligations and opportunities may relate to:	• best practice models • career opportunities • professional associations • roles, responsibilities and employment rights of contracted workers • unions and employer bodies
Information on new technology may relate to:	• advances in technology and equipment • likely effects of new technology on current work practices and the structure of the industry • sources of technical advice and support • ways of upgrading skills to allow for the use of new technology

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RANGE STATEMENT	
Opportunities to update knowledge of the design industry may relate to:	• conferences, symposiums, workshops, master classes • discussions with industry practitioners and colleagues • exhibitions/events • expositions • industry associations and organisations • industry functions • industry journals • internet • media • personal observations and experience • policy and procedures manuals • reference manuals • seminars and other professional development opportunities • unions and other sources of industrial relations information
Issues of concern to the industry may be related to:	• changing nature of the marketplace • convergence • government initiatives • industry expansion • labour issues
Information on ethical and legal work practices may relate to:	• contracts • copyright, moral rights and intellectual property issues • legal requirements • permits

Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

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Co-requisite units

Co-requisite units		

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BSBDES305A Source and apply information on the history and theory of design

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to source information on design history and theory, and to apply that information to one's own area of work. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who work in design and need to develop and maintain a general knowledge of design history and theory. More complex research into design theory and design trends is covered by BSBDES602A Research global design trends and BSBDES701A Research and apply design theory.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Collect information on history and theory of design	1.1. Identify and access relevant ***sources of information*** on design history and theory 1.2. ***Organise research material*** and findings for current or future use in design practice, in a manner which facilitates easy access and cross-referencing
2. Apply information to own area of work	2.1. ***Evaluate information*** in the context of current design practice 2.2. Assess ways in which aspects of information on design history and theory could be used or adapted to inform current practice 2.3. Use relevant information in a culturally appropriate way to develop an understanding of own area of work
3. Update and maintain knowledge of design trends	3.1. Identify and use opportunities to update and expand knowledge of design trends and developments 3.2. Incorporate and integrate knowledge into design activities

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
The following skills must be assessed as part of this unit: • research and comprehension skills to source, understand and apply information on design history and theory • research skills to source readily available information on design history and theory.
Required knowledge
• copyright, moral rights, intellectual property issues and legislation as it relates to using information in own work • current trends in design • evolution of design • organisational information practices and their application • sources of information on design history and theory relevant to own design work.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • knowledge of the history and theory of design and how this may be applied in design practice • application of research and evaluation skills.
Context of and specific resources for assessment	Assessment must ensure: • access to information sources on design history and theory.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples

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EVIDENCE GUIDE	
	are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of how history and theory have been integrated into a design project undertaken by the candidate • evaluation of a presentation made by the candidate about how design history or theory has influenced work • oral or written questioning to assess knowledge of design history, trends and theory.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Sources of information may include:	• cultural, historical, scientific texts • film, video, internet • images, objects • journal articles • oral histories • performances/presentations • philosophical texts • religious and spiritual texts • stories • technical or medium specific information
Information may relate to:	• aesthetics • criticism • cultural issues • gender and identity issues

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RANGE STATEMENT	
	• histories of art, craft and design • histories of performances/presentations and related skills • land and place • new technologies • politics • spiritual concerns • world histories
Organising research material may include:	• databases • diagrams, charts • digital storage systems • files, scrapbooks, diaries • mind maps • sketches
Evaluating information may include:	• comparing • considering merit • contrasting • critiquing • discussing and debating • reflecting

Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBDES401A Generate design solutions

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to generate design solutions in response to a particular design need. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who generate concepts and solutions in response to a design challenge in any industry context. The starting point may be an open or closed brief; a spontaneous idea; modification of an existing product, service, process or system; or a point in an ongoing design process. This unit builds on BSBDES201A Follow a design process, and places greater focus on research, concept generation and collaboration with others as key aspects of the design process.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Define the design challenge	1.1. Determine and evaluate ***user***/***client needs*** 1.2. Clarify ***specifications***, ***parameters and constraints*** of the design challenge in consultation with relevant stakeholders 1.3. Articulate the essence of the design challenge in an ***appropriate format***
2. Undertake research to inform the design solution	2.1. Source, evaluate and acknowledge ***information*** that may assist in responding to the design challenge 2.2. Consider ***historical***, ***current and future perspectives and trends*** that might inform design solutions 2.3. Consider relevant ***social***, ***economic***, ***environmental***, ***ethical and cultural issues*** that may impact on design solutions 2.4. Analyse, distil and collate information to inform the development of the design solution
3. Communicate and	3.1. Establish and develop working relationships with

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ELEMENT	PERFORMANCE CRITERIA
collaborate with others	***key stakeholders*** 3.2. Seek and integrate input and ideas from others during the design process 3.3. Inform key stakeholders about progress of the design and related implications 3.4. Negotiate and agree on any changed requirements or modifications
4. Generate ideas and responses to the design challenge	4.1. Reflect on and integrate ideas generated from research and consultation 4.2. Use a range of ***creative thinking techniques*** to generate different options and ideas 4.3. Apply relevant principles of ***functionality***, ***ergonomics***, ***aesthetics and sustainability*** to the development of different options
5. Select a design solution	5.1. Develop and use a range of ***criteria against which to evaluate different options and ideas*** 5.2. Select a preferred solution against agreed criteria and in consultation with relevant key stakeholders 5.3. Adjust and refine proposed design solution based on research, testing and reflection 5.4. Present proposed design solution with appropriate ***supporting documentation*** according to project requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to liaise, consult and negotiate with others on potentially complex issues • creative, critical thinking and problem-solving skills to generate a range of ideas and solutions to a particular design challenge • research skills to interpret and develop a wide range of visual and written information sources • planning and organisational skills to collate information, and to coordinate liaison and consultation with others during the design process.

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge
• copyright, moral rights and intellectual property issues and legislation that impact on design in the relevant context • elements and principles of design and their application in the relevant design context • features of the wider industry, economic, social and historical context in which design solutions are being generated • other designs and the work of other design practitioners in the relevant context • sources of information that support the development of technical and other knowledge • technical knowledge of the area for which design solutions are being generated - in terms of materials, tools, equipment, techniques and industry processes and procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of a design solution through research, reflection and the generation and refinement of ideas • effective collaboration with others in the design process • knowledge of design trends and technologies in the relevant industry context.
Context of and specific resources for assessment	Assessment must ensure: • interaction with others to reflect the collaborative nature of the design process • access to sources of information on design in the relevant industry context.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

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EVIDENCE GUIDE	
	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of a design solution generated by the candidate against an original brief, set of criteria or guiding objectives • evaluation of the process used to reach a design solution in terms of research and ideas generation/refinement • oral or written questioning to assess knowledge of technical and context issues that impact on design in a given industry context.
Guidance information for assessment	The design process does not occur in isolation. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. Combined assessment with the following unit is appropriate: • BSBCRT301A Develop and extend critical and creative thinking skills.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

User*/*client needs may be:	• expressed in a brief:
	  • diagrammatic
	  • verbal
	  • visual
	  • written
	• expressed in other documentation such as research papers or workplace plans
	• informally articulated
	• in need of further research

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RANGE STATEMENT	
Specifications**, **parameters and constraints may relate to:	• audience • budgeting and financing • cost of production • medium • purpose • technical issues • timeframes
Appropriate format may include:	• drawings or sketches - manual or computer aided design and drafting (CADD) • electronic presentation • verbal presentation • written notes with rationale or description
Information may include:	• codes of practice • contractual obligations • historical data • industry standards • legal requirements • specialist information • technological trends and developments
Historical**, **current and future perspectives and trends may relate to:	• industry context • materials • social or ethical issues • sustainability • technologies
Social**, **economic**, **ethical and cultural issues may include:	• availability of materials, tools or equipment • budgetary issues • community impact • cost of production • customer relationships • government policies • sponsorship opportunities • triple bottom line (people, planet, profit) • workforce relationships
Environmental issues may include:	• conservation of resources • energy efficiency • environmental consciousness/green design • recycling • use of renewable resources • waste/by products/emissions

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RANGE STATEMENT	
Key stakeholders may include:	• client • employer • end user • peers • supervisor • technical experts • work colleagues

Creative thinking techniques may include:	• brainstorming:
	  • bulletin board
	  • buzz session
	  • computer-aided
	  • sequencing
	  • stop and go
	• daydreaming and mental wandering
	• Edward de Bono's six thinking hats
	• ego alter or heroes
	• graphic organisers:
	  • concept fans
	  • visual maps
	  • webbing
	• lateral thinking games
	• making associations
	• mind mapping
	• morphological analysis
	• storytelling
	• sub-culture surfing
	• trigger words
	• use of metaphors and analogies
	• vision circles
	• visualisation
	• wishful thinking
	• word salads

Functionality, ***ergonomics***, ***aesthetics and sustainability*** may be related to:	• end use and users • production processes
Criteria against which to evaluate different options and ideas may relate to:	• access to resources - physical, human or financial • aesthetic appeal • consistency with original brief

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RANGE STATEMENT	
	• desired level of originality and innovation • ease of manufacture or further development • environmental sustainability • ethical issues • health and safety requirements • impact upon client and community • industry standards and practice • legal issues • level of risk • personal affinity with medium and materials • technological considerations
Supporting documentation may include:	• drawings or plans • illustrations • material samples • models • photographs • specifications for production

Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

Co-requisite units

Co-requisite units		

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BSBDES402A Interpret and respond to a design brief

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to interpret and creatively respond to a design brief through the production of work. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in any industry or design context where work is prescribed by a commissioning agent/client in the form of a brief. The unit is holistic in nature and focuses on the integration of the creative, communication and planning processes that support effective response to a design brief. In practice, this unit supports and is supported by other units describing the specialist skills and knowledge required by specific design disciplines. Work is carried out independently, although guidance would be available if required. Skills involving the more complex process of negotiating and refining a design brief, or managing the production process are found in BSBDES502A Establish, negotiate and refine a design brief and BSBDES601A Manage design realisation.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Interpret design brief	1.1. Correctly interpret the ***specifications*** of the ***design brief*** 1.2. Establish and clarify user or client for the proposed product/service to inform design decisions 1.3. Identify and clarify specifications, ***parameters or constraints*** of the design brief in consultation with relevant colleagues 1.4. Source and evaluate ***information pertinent to design brief***
2. Explore and develop design concept	2.1. Generate ideas for design concept through research, exploration and experimentation 2.2. Develop initial design concept consistent with design brief parameters 2.3. Evaluate and explore options for refining the concept

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ELEMENT	PERFORMANCE CRITERIA
	to best meet design brief parameters 2.4. Refine options and select the approach which best meets design brief requirements
3. Liaise with client	3.1. Agree on communication process and frequency of communication with the client 3.2. Present ***concepts for work*** at appropriate stages during design process as required 3.3. Present and explore different options and creative ideas with client when appropriate 3.4. Pro-actively seek and act on client feedback 3.5. Reach ***agreement on concept*** for work which complies with design brief
4. Plan production of work	4.1. Assess specific design production risks 4.2. Identify all components required to produce a prototype 4.3. Assess technical requirements for production against specified guidelines 4.4. Identify and consult with ***support services*** required for production 4.5. Produce a prototype and evaluate against design brief requirements 4.6. Analyse prototype and determine any further adjustments to production requirements 4.7. Finalise production specifications supported by accurate and complete ***documentation***
5. Complete production of work	5.1. Collect and/or organise required components for the work 5.2. Produce or monitor the production of work ensuring all parameters of design brief are met 5.3. Accurately document work progress in a format appropriate to the nature of the design and requirements of design brief 5.4. Seek client approval for work where appropriate

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills
• communication skills to liaise with clients and colleagues on design concepts, and to effectively present potentially complex ideas • creative thinking skills to generate and explore a range of possible responses to design brief requirements • critical thinking and problem-solving skills to work out different ways of meeting different design and production challenges • Research, literacy and analytical skills to interpret a brief and to source and evaluate information pertinent to the brief • planning and organisational skills to integrate and coordinate creative, communication and planning issues into the work process • self-management skills to take pro-active responsibility for all the elements involved in responding to a design brief.
Required knowledge
• copyright, moral rights and intellectual property issues and legislation relevant to the ways design concepts are developed and presented • different ways of presenting, communicating and documenting design concepts (as relevant to the context of work) • format of design brief typically used in the relevant industry or design context • principles and key features of project management relevant to a design project • specific project management factors that apply to a design project • terminology typically used in a range of design briefs.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • effective response to the requirements of at least two design briefs, including interpretation, concept development, communication and production planning • knowledge of copyright, moral rights and intellectual

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EVIDENCE GUIDE	
	property issues and legislation relevant to the ways design concepts are developed and presented.
Context of and specific resources for assessment	Assessment must ensure: • access to the materials resources and equipment needed to interpret design brief, source information pertinent to design brief and to respond to design brief within its parameters • interaction with others to reflect the communication and collaboration aspects of this unit.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of design documentation and completed work undertaken by the candidate • oral or written questioning to assess knowledge of typical parameters and constraints for work in a given context, including practical production issues • evaluation of presentation made by the candidate to present concepts and to articulate the creative and other processes that lead to the development of final design concept.
Guidance information for assessment	The design process does not occur in isolation. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Specifications may refer to:	• budget

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RANGE STATEMENT	
	• location • materials • media • quantity • scope of work • site • size • target group • timeframes
Design brief may be:	• written • diagrammatic • visual • verbal
Parameters or constraints may refer to:	• budgeting and financing arrangements • cost of production • legislative and regulatory requirements • outlets • number of items • purpose of item • timeframes
Information pertinent to design brief may be about:	• current trends in the application of materials, techniques, tools and equipment • design standards • health and safety • industry standards • legal, contractual, ethical and copyright considerations • material characteristics and capabilities • new technology and innovation • stylistic considerations
Concepts for work would usually be in written format and may include:	• computer generated text or diagrams, for example MS Word PowerPoint presentation • diagrams • drawings • photographs or digital images • text • video
Agreement on the concept may involve:	• development of an artist statement • discussion with client • discussion with other specialists (e.g. technical

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RANGE STATEMENT	
	or production) • formal contract for the work • negotiation
Support services may involve:	• agencies • digital services • engineers • fabricators, for example for models, props, sets • hire studios and/or equipment • other specialists, for example make-up, stylists • production facilities • work assistants
Documentation may include:	• charts/diagrams • CD • data sheets with notes • drawings/sketches • illustrations • material samples • photographs or digital images • slides • specifications for fabricators • storyboard and text • video or DVD • written rational or description

Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

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Co-requisite units

Co-requisite units		

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BSBDES403A Develop and extend design skills and practice

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and extend skills as a practising designer. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to any individual who works as a designer in any industry context. Designers may work independently or be employed by an organisation. Designers must continually refine, develop and evaluate their own conceptual and technical skills. Research, experimentation and collaboration are key factors in this process.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Acquire and develop technical skills	1.1. Plan ***strategies*** to ensure the development of appropriate ***technical skills*** in design practice 1.2. Plan and use opportunities to develop and assess technical skills 1.3. Identify and use practice, feedback, discussion and evaluation opportunities to continuously improve technical skills 1.4. Develop and extend technical skills through ***testing capabilities*** of materials, tools and equipment 1.5. Identify and use ***relevant media*** to stimulate technical and professional development
2. Develop conceptual skills and ideas	2.1. Engage in ongoing experimentation and exploration of different ideas and techniques 2.2. Discuss ideas with others and apply knowledge gained to inform own work 2.3. Use work practice to gain experience in a range of genres and interpretations 2.4. Study the work of others to stimulate conceptual and technical skills development 2.5. Research and share ideas across a range of design disciplines 2.6. Identify and use a range of ***opportunities to develop***

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ELEMENT	PERFORMANCE CRITERIA
	own skills and keep informed about current design practice
3. Develop own voice	3.1. Explore and experiment with new ideas in making and/or interpreting design work 3.2. Explore and use technology, where appropriate, to develop ***own voice*** and expand practice 3.3. Demonstrate own voice through design project realisation
4. Evaluate own work	4.1. Seek and apply constructive criticism from others to improve own work 4.2. Evaluate own work against planned strategy for own practice 4.3. Evaluate own work in the context of work by others in order to extend own practice 4.4. Adjust work processes and practice as necessary to improve technical, conceptual and commercial outcomes
5. Research work opportunities	5.1. Correctly identify ***sources of information*** relating to work opportunities for designers 5.2. Identify ***networks*** and ***promotional opportunities*** for designers which may be helpful in developing career opportunities 5.3. Incorporate research results and information into own work and career planning

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to discuss potentially complex ideas and concepts with others and to engage in critical discourse about own work • creative thinking skills to explore and generate new ideas for design work • comprehension skills to interpret and communicate a wide range of potentially complex information about design concepts and technologies • problem-solving skills to explore and develop strategies and solutions to new design challenges and opportunities • self-management skills to take pro-active responsibility for own professional

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REQUIRED SKILLS AND KNOWLEDGE
development.
Required knowledge
• current and emerging copyright, moral rights and intellectual property issues and legislation, and their impact on designers • current and emerging designers in the relevant design discipline • current and emerging trends and technologies in the relevant design discipline, and the opportunities and challenges they represent • professional development information and resources available to designers • sources of information relating to work opportunities and career planning.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of own voice through exploring and experimenting with new ideas in making and/or interpreting work • application of planned strategies to develop appropriate skills in design practice • use of discussion and evaluation opportunities to inform and develop technical and conceptual skills.
Context of and specific resources for assessment	Assessment must ensure: • access to the materials, resources and equipment used in the development of technical and conceptual skills in the relevant design context.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of candidate diary or log detailing the

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EVIDENCE GUIDE	
	ways in which different experiences and opportunities have been used to develop and extend skills • evaluation of bodies of work that demonstrate the progressive development of skills • evaluation of a presentation by the candidate addressing the ways in which a pro-active approach to skills development has been taken.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Strategies for developing self as a designer may include:	• being involved in a range of relevant design activities • communicating with peers • experimenting • participating in professional development and other learning opportunities • participating in relevant groups or associations • practising • undertaking training courses • working effectively with supervisor • working with a mentor or coach
Technical skills may include skills in:	• animation • digital/electronic design • entertainment design • fashion/clothing/accessories design • furnishings • furniture design • graphic design

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RANGE STATEMENT	
	• illustration/technical drawing • interior design • jewellery design • object design • photoimaging • tableware design • other design disciplines
Testing capabilities refers to:	• experimenting with innovative applications • extending the possibilities of materials, tools and equipment towards their full potential
Relevant media may include:	• catalogues • journals • magazines
Opportunities to develop own skills may include participation in and/or attendance at, some of the following:	• competitions • exhibitions • floor talks at galleries • laboratories • lectures, seminars, conferences, symposiums • manufacturing sites • master classes • professional organisations • trade fairs, expositions
Developing ***own voice*** includes:	• analysing and researching the work of others relevant to selected area of specialisation • analysing conventions, practices and customs in design practice • developing repertoire and knowledge • exploring elements and principles of design
Sources of information may include:	• design journals • employer listings • exhibition catalogues and programs • job advertisements • websites • word of mouth
Networks may include:	• alumni organisations • colleagues and teachers • consumer organisations • professional associations
Promotional opportunities may	• applications to funding bodies

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RANGE STATEMENT	
include:	• competitions • demonstrations • exhibitions • performances • trade fairs

Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

Co-requisite units

Co-requisite units		

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BSBDES501A Implement design solutions

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to take a design concept or solution to the implementation stage. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who implement concepts and solutions in response to a design challenge in any industry context. It takes BSBDES401A Generate design solutions, to the next stage focusing on the resourcing and testing of a design concept. The outcome of work could be a completed product, object, system or service, but is more likely to be a complete or partial prototype or model for the design. The focus of the unit is on a general knowledge of design techniques and processes, and practical application to a specific design context.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Organise resources for realising the design solution	1.1. Confirm the nature and scope of the proposed design solution 1.2. Research ***resources*** required for developing the design concept to ***implementation stage*** 1.3. Investigate different ***factors that impact on the selection and use of resources*** 1.4. Select and prepare resources based on research and other ***legislative or organisational requirements***
2. Test the design solution	2.1. Experiment with a range of different ***techniques and processes to test the design solution*** 2.2. Evaluate, challenge and refine testing processes 2.3. Gain input and feedback from ***key stakeholders*** during the testing process 2.4. Accurately document outcomes of testing 2.5. Select final design solution based on outcomes of

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ELEMENT	PERFORMANCE CRITERIA
	testing and input from others
3. Develop the prototype or model	3.1. Create prototype or model based on agreed approaches 3.2. Where appropriate, select and organise materials, tools and equipment according to chosen design solution 3.3. Expose model or prototype to quality checks and ongoing analysis, enhancement and refinement 3.4. Compare completed prototype or model against ***identified needs and other considerations*** and make adjustments as required
4. Present the prototype or model	4.1. Identify key stakeholders to whom design should be presented 4.2. Select ***appropriate format*** for presentation based on nature of the audience and design 4.3. Present prototype or model in a way that optimises clarity, conciseness and appeal

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to consult with others on testing and refinement of the design solution
- creative thinking skills to develop and adapt responses to experimentation and testing processes
- literacy skills to interpret and develop a wide range of visual and written information sources
- planning and organisational skills to organise resources and to coordinate a testing process, including liaison and consultation with others during the design process
- problem-solving skills to respond to unpredictable issues and challenges that arise during the testing process.

Required knowledge

- copyright, moral rights and intellectual property issues and legislation that impact on design in the relevant context
- elements and principles of design and their application in the relevant design

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REQUIRED SKILLS AND KNOWLEDGE
context • features of the wider industry, economic, social and historical context for the design solution • other designs and the work of other design practitioners in the relevant context • sources of information that support the development of technical and other knowledge • technical knowledge of the area for which design solutions are being implemented - in terms of relevant resources, materials, tools, equipment, techniques and industry processes and procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • critical analysis, testing and development of a model, prototype or aspect of a design solution to meet an identified need • knowledge of design trends and technologies in the relevant industry context.
Context of and specific resources for assessment	Assessment must ensure: • interaction with others to reflect the collaborative nature of the design process • access to resources required to test a design solution in a given industry context (e.g. finance, materials, tools, equipment, expertise).
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of a design solution implemented by the candidate against an original brief, set of criteria or

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EVIDENCE GUIDE	
	guiding objectives • evaluation of the processes used to test and refine the solution • oral or written questioning to assess knowledge of technical and context issues that impact on design in a given industry context.
Guidance information for assessment	The design process does not occur in isolation. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. Combined assessment with the following unit is appropriate: • BSBDES401A Generate design solutions.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Resources will depend on the nature of the design, but may be:	• financial:
	  • budget allocation
	  • grants
	  • in kind contributions
	  • sponsorship
	• human expertise:
	  • creative
	  • financial
	  • management
	  • technical
	• physical:
	  • hardware or software
	  • materials
	  • tools
	  • workspaces

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RANGE STATEMENT	
Implementation stage could be the point at which:	• marketing can commence • production can commence • production is confirmed • staff can be employed
Factors that impact on the selection and use of resources may relate to:	• environmental considerations • industry context • social or ethical issues • sustainability • technologies
Legislative or organisational requirements may relate to:	• commonwealth or state/territory legislation • licensing requirements • local regulations and standards • policies or procedures
Techniques and processes to test the design solution will depend on the nature of the design, and may include:	• colour tests • mock ups • models • practice pieces • samples • scenario testing • stress tests
Key stakeholders may include:	• client • employer • end user • peers • supervisor • technical experts • work colleagues
Identified needs and other considerations may relate to:	• access to and availability of resources • aesthetic considerations • budgetary constraints • ease of manufacture • opportunities for innovation • specifications of a brief • wider industry trends
Appropriate format may include:	• drawings or sketches - manual or computer aided design and drafting (CADD) • electronic presentation • verbal presentation • written notes with rationale or description

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

Co-requisite units

Co-requisite units		

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BSBDES502A Establish, negotiate and refine a design brief

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to work pro actively with a client or commissioning organisation to develop and negotiate a design brief. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in any industry or design context where the designer plays a key role in determining the scope and nature of work required. This unit builds on BSBDES402A Interpret and respond to a design brief, which focuses on working with an established brief. Establishment, negotiation and refinement of a design brief requires the integration of highly developed creative thinking, communication and planning skills in a process that may not be linear. Adaptability and effective response to change and new ideas is crucial. In practice, this unit supports and is supported by other units describing the specialist skills and knowledge required by specific design disciplines.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Establish design requirements	1.1. Identify and make appropriate contact with ***relevant stakeholders*** for the design project, in addition to the client 1.2. Identify and source ***information and references relevant to the design project*** 1.3. Undertake ***critical analysis*** of sources and extract key information to inform the design project 1.4. Liaise with client and other key stakeholders to determine ***overall objectives and parameters*** for the design project 1.5. Pro-actively seek, review and act upon information needed to inform constructive communication with client 1.6. Build trust and respect between self and client

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ELEMENT	PERFORMANCE CRITERIA
	through effective use of communication skills and demonstration of professional integrity
2. Develop and refine design brief	2.1. Develop concepts and ideas for inclusion in design brief that take account of overall objectives and parameters 2.2. Undertake own analysis of concept and challenge ideas and approaches taken to ensure responsiveness to project needs 2.3. Present ideas in an ***appropriate format/medium*** and seek feedback from key stakeholders 2.4. Use effective communication techniques to generate discussion, debate and critical analysis 2.5. Re-evaluate and refine options based on own analysis and discourse with others 2.6. Establish and agree on final nature and scope of design brief with client and accurately document details
3. Negotiate terms and conditions	3.1. Negotiate and agree ***terms and conditions*** of the brief in accordance with relevant ***organisational and professional standards*** 3.2. Clarify, agree and document roles and responsibilities of those involved in the project 3.3. Confirm agreements in writing in accordance with ***organisational requirements*** 3.4. Identify the need for and seek specialist advice in developing, formal agreements or contracts where appropriate

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication, presentation and negotiation skills to work with clients to establish and refine design briefs • creative thinking skills to generate and develop concepts and ideas for the design brief, including responses to situations where parameters may be quite broad and open or very restrictive

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REQUIRED SKILLS AND KNOWLEDGE
• literacy skills to research and evaluate a wide range of source materials for the development of ideas and concepts • numeracy skills to develop realistic costings for realisation of design concept • planning and organisational skills to guide and coordinate the process of negotiating and finalising a design brief • problem-solving skills to pro-actively identify and develop effective solutions to complex challenges of a varied and unpredictable nature • self-management skills to take responsibility for driving and guiding the brief negotiation process.
Required knowledge
• copyright, moral rights and intellectual property issues and legislation that impact on design in the relevant work context • legal issues that affect negotiations and contracts in the relevant work context • scope, nature and potential variations within design briefs relevant to a specific context • sources of information that inform the development of design concepts within a specific industry context.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • practical demonstration of skills through the development and finalisation of at least two design briefs for a specific industry purpose • effective collaboration and communication skills to work with others to develop and refine a design brief • knowledge of the design process within the specific industry context/design discipline.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate equipment and media to communicate and present ideas and concepts • access to sources of information relevant to the

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EVIDENCE GUIDE	
	industry context • interaction with and involvement of others to reflect the collaborative nature of the work, and the communication and negotiation skills required.
Method of assessment	A range of assessment methods should be used t assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of a design brief in which the candidate has played a significant development role • evaluation of reports prepared by the candidate detailing the processes undertaken for establishing and refining the design brief, including challenges faced and lessons learned for the future • observation of discussions and negotiations with client and other stakeholders • oral or written questioning to assess knowledge of the process and issues surrounding legislation, industry context, sources of information • evaluation of candidate response to different scenarios to assess ability to adapt approach to different client requirements and contexts.
Guidance information for assessment	The design process does not occur in isolation. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • any specialised design unit.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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RANGE STATEMENT	
Relevant stakeholders in addition to the client may include:	• authorities such as local council for outdoor event design • creative specialists • other designers • others involved in the project • production teams • technical specialists • venue managers
Information and references relevant to the design project may include:	• environment • financial information • legislative and regulatory requirements • music and/or film/video • oral history • organisational information • photographs and other artworks • project team members • promotional material • technical reports/data • texts and other written references • work of other designers/artists
Critical analysis may involve:	• considering how ideas may be adapted • considering how ideas may be challenged • drawing links between references and potential designs • evaluating work of other designers • making judgements about potential ideas in relation to the budget and available resources • making judgements about relevance of information and ideas
Overall objectives and parameters may relate to:	• audience • availability of materials, tools, equipment and human resources • budget constraints • conflicting competing demands • environmental sustainability • organisational vision • presentation venue/context • sponsorship • timeframe • triple bottom line (people, planet, profit)

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RANGE STATEMENT	
Appropriate format/medium for presentation of ideas may include:	• checklists • digital presentation • drawings • electronic presentations • graphic formats • models • paintings • photographs • plans • prototypes • verbal description/oral presentation • video • visual diagrams
Terms and conditions may relate to:	• conceptual parameters • contracts • deliverables • legal and financial issues such as processes to be used • ownership and copyright • reporting • technical requirements • time lines
Organisational and professional standards may include:	• industry-accepted fee schedules • industry standards for written agreements • requirements for written agreements
Organisational requirements for confirming agreements may include:	• approval and ongoing communication processes

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Design - Design Process

Co-requisite units

Co-requisite units		

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BSBDES601A Manage design realisation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage the process of taking a design from concept to final realisation or production. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in any industry context or design discipline who take responsibility for turning design concept into reality - a product or service of value to the end user. This person could be an individual designer-maker or a designer working as part of a larger design/production team. The unit has a strong focus on planning, implementation and monitoring skills, combined with a sound knowledge of design and production issues and challenges in a given context. In practice this unit supports and is supported by other units describing the specialist skills and knowledge required by specific design disciplines.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Plan realisation of the design	1.1. Collect, analyse and maintain ***relevant information on the design***
	1.2. Discuss and agree on ***standards of work and monitoring requirements*** with ***appropriate stakeholders***
	1.3. Develop clear plan and schedule for design realisation, including key roles and responsibilities linked to time lines and budget
2. Implement and monitor realisation of the design	2.1. Organise and/or allocate ***resources*** to achieve the realisation of design within required standards, timeframes and budget
	2.2. Liaise with others involved in design realisation to ensure obligations and quality standards are met within time, budget and technical resources

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Maintain accurate, relevant and complete ***documentation*** in accordance with agreed standards 2.4. Monitor process to ensure integrity of design is maintained at all times, including through the process of challenging and interrogating own design work 2.5. Promptly identify ***difficulties or problems*** that arise in relation to realisation of the design and take action to rectify the situation
3. Liaise and negotiate with stakeholders	3.1. Establish and maintain appropriate ***communication channels*** with relevant stakeholders 3.2. Pro-actively seek and provide information to facilitate effective design realisation 3.3. Adhere to agreed terms and conditions or negotiate appropriate changes in light of changed circumstances 3.4. Negotiate and agree on revisions with relevant parties in a professional manner, to enhance quality of outcome
4. Complete design process	4.1. Finalise design outcomes in accordance with terms and conditions 4.2. Seek feedback from key stakeholders on finished design and make final adjustments as agreed 4.3. Evaluate completed design in relation to own work and overall process, to inform future practice

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication and negotiation skills to lead and participate in effective client/principal, stakeholder and project team liaison during design realisation • creative thinking skills to generate new or adapted ideas in response to realisation challenges • literacy skills to research and evaluate a wide range of source materials on design and to complete relevant design documentation • numeracy skills to manage budgets

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REQUIRED SKILLS AND KNOWLEDGE
• planning and organisational skills to coordinate and lead potentially complex processes involving a range of interrelated factors and challenges • problem-solving and decision making skills to develop and implement solutions to unpredictable problems.
Required knowledge
• copyright, moral rights, intellectual property issues and legislation that impact on design work in the relevant industry context at a managerial level • occupational health and safety requirements relevant to the particular work context/design discipline • production/realisation processes as they apply to designs in a particular industry context or design discipline including materials, tools, equipment and processes • quality assurance for design concept realisation applicable to the specific industry context/design discipline.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • planning and implementation of design realisation so that finished product or service meets the requirements of design brief • effective communication and negotiation skills in relation to working with others for design realisation • knowledge of the design process in the specific industry context/design discipline.
Context of and specific resources for assessment	Assessment must ensure: • access to resources, tools, materials and equipment for realisation of a design in specific context • access to a design concept that the candidate can take to realisation stage • interaction with and involvement of others to reflect the collaborative nature of the unit and the communication and negotiation skills required.

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of finished products or services where the candidate has managed the realisation process • evaluation of progress reports or completion reports prepared by the candidate • evaluation of candidate reports on the realisation process highlighting different management techniques used, challenges in the process and how these were addressed.
Guidance information for assessment	The design process does not occur in isolation. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • any specialised design unit.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant information on the design may include:	• artwork • brief • checklists • financial data • models • production data • prototypes • specifications • technical data

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RANGE STATEMENT	
	• visual diagrams • working drawings
Standards of work and monitoring requirements may relate to:	• budget targets • creative issues • legal issues • reporting requirements • technical quality • timeframes
Appropriate stakeholders may include:	• client • community • others on whom the design will impact, for example technical or production personnel • others working on the design realisation process • supervisor/manager
Resources may include:	• financial • human • physical
Documentation to be maintained may include:	• digital records and presentations • financial reports • models • photographs • progress reports • prototypes • records of work • working drawings
Difficulties or problems may relate to:	• budgetary overruns • conceptual issues • legal issues • scheduling problems • technical quality
Communication channels may include:	• electronic updates • inspections • project meetings • telephone discussions

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

Co-requisite units

Co-requisite units		

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BSBDES602A Research global design trends

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to research and critically evaluate global design trends. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who need to maintain a current and comprehensive knowledge of global design trends to inform their own professional practice. Often the individual would be a designer, but the unit may also be relevant to those who work in related management, marketing and production areas. The unit focuses on research and analysis of information and ideas at a complex level, plus the evaluation and extension of one's own professional skills.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Research design trends	1.1. Analyse and select ***formal and informal research strategies*** to source ***information on global design trends*** 1.2. Identify and explore ***new and alternative sources*** 1.3. Evaluate the credibility of information gathered and ensure research scope is sufficiently broad
2. Analyse design trends to inform own practice	2.1. Use information to challenge and extend own perspectives and ways of thinking 2.2. Examine and assess the implications and consequences of design trends on own work 2.3. Use ***critical analysis*** to identify creative or commercial opportunities presented by emerging trends and technologies 2.4. Develop systems to identify and respond to future opportunities
3. Develop and articulate positions	3.1. Develop ***substantiated positions and ideas*** in

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ELEMENT	PERFORMANCE CRITERIA
and ideas	relation to global design trends 3.2. Generate informed discussion, debate and critical analysis with peers and colleagues 3.3. Use debate and feedback as a way of challenging and refining own positions
4. Extend own design skills	4.1. Pro-actively identify and use opportunities presented by research to extend own design skills 4.2. Re-evaluate and refine approaches to work in the context of current and emerging trends 4.3. Use practice, discussion and ongoing evaluation to continuously improve skills

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to articulate and debate conceptual or technical ideas
- critical thinking skills to distil and synthesise information from varied sources and to develop own positions and ideas on a complex range of issues
- literacy skills to research complex, varied and unfamiliar information sources
- planning and organisational skills to undertake the research process.

Required knowledge

- broad global design trends that apply to all design disciplines
- business implications/consequences of adopting trends and emergent technologies
- copyright/moral/intellectual property issues associated with research and with design more broadly
- design industry networks and professional development opportunities - local, national and international
- research methodologies and options
- sources of information on global design, design trends and broader references that may inform emerging and innovative design practice
- specific current and emerging design technologies and trends (at a global level) in at least one area of design.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • conducting research on a complex range of design issues, trends and ideas • analysing, critiquing and synthesising complex sources to develop own positions and ideas • design research • knowledge of copyright/moral/intellectual property issues associated with research and with design more broadly.
Context of and specific resources for assessment	Assessment must ensure: • use of a current and varied range of familiar and unfamiliar information sources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of research undertaken by the candidate in terms of scope, depth and the level of critical thinking applied • direct observation of candidate debating issues arising from research into global design trends • oral or written questioning to assess knowledge of global design trends in terms of depth and complexity.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Formal and informal research strategies may include:	• formal study • participating actively in relevant industry associations • participating in, and contributing to, discussion through conferences, meetings, seminars, courses and journals • participating in professional development and other learning opportunities • reading current literature, including specialist journals and industry magazines • web research
Information on global design trends may relate to:	• best practice examples • emerging and future technology • history • philosophy • role of design in the broader social, economic and political environment • sustainability

New and alternative sources may include:	• inspirations from nature
	• work from other areas of community or business activity for example:
	  • artists
	  • authors
	  • business people
	  • entertainers
	  • film makers
	  • historians
	  • philosophers
	  • photographers
	  • scientists

Critical analysis may include:	• analysing and evaluating actions and policies • clarifying issues, values and standards

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RANGE STATEMENT	
	• comparing analogous situations • comparing and contrasting ideals with practice • comparing and evaluating beliefs, interpretations and theories • developing criteria for evaluation • distinguishing relevant from irrelevant facts • examining and evaluating assumptions • exploring implications and consequences • generating and assessing solutions • making interdisciplinary connections • making plausible inferences and predictions • noting significant similarities and differences • reading and listening critically
Substantiated positions and ideas may be those which are:	• grounded in appropriate research • result of rational and logical thought • subjected to the analysis of others • supported by relevant information

Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

Co-requisite units

Co-requisite units		

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BSBDES701A Research and apply design theory

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to research and apply different theories of design. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who use sophisticated research and critical analysis skills in the exploration of design, design theory and its application to professional design practice. The scope of the research activity has both significant depth and breadth. A broader, more general approach to the history and theory of design is covered by BSBDES305A Source and apply information on the history and theory of design.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Research design theory	1.1. Use a range of ***research techniques*** to source information about design theory 1.2. Identify and explore ***new***, ***emerging and alternative sources of ideas and thinking*** about design 1.3. Expand own knowledge and understanding of design through review and ***critical analysis*** of information 1.4. Analyse, compare and contrast a range of ***theoretical perspectives and thinking*** on design
2. Apply theories of design to professional practice	2.1. Evaluate the relevance and application of different theories of design based on analysis of ***own professional and personal experience*** 2.2. Analyse the ways in which different aspects of history, theory and other influences are applied, adapted or challenged in practice 2.3. Assess the ways in which theories and thinking about design may be applied in ways that provide ***benefits to individuals***, ***businesses and communities***

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ELEMENT	PERFORMANCE CRITERIA
3. Develop, articulate and debate own perspectives on theories of design	3.1. Take a critical approach to different theories and reflect on own ideas and responses 3.2. Develop own ***substantiated positions*** in response to research and analysis 3.3. Articulate own positions in a manner which demonstrates ***clarity of thought and conceptual understanding*** of different theories and thinking 3.4. Debate own positions on design showing belief in own and ideas and a willingness to remain open to new perspectives

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to articulate and debate complex concepts
- critical thinking skills to analyse complex information, and to develop and substantiate own positions and responses to theories and thinking around design
- literacy skills to research information dealing with complex concepts and theories
- self-management skills to develop and substantiate own views and ideas.

Required knowledge

- different theories of design, including different historical perspectives and current and emerging thinking
- relationship between theories of design and design in practice (in a particular work or broader social context)
- relationships, similarities and differences at a conceptual and practical level between the concepts of design, innovation and creativity
- systemic impacts on design - social, economic, political and environmental.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • research into past, current and emerging theories of design • development of substantiated positions on design and its application in response to own analysis and research • knowledge of different theories and thinking on design and its application in different social and work contexts.
Context of and specific resources for assessment	Assessment must ensure: • use of current and emerging sources of information and thinking on design.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of research undertaken by the candidate into design theory and its application • evaluation of candidate's participation in discussion and debate on theories of design
Guidance information for assessment	The design process does not occur in isolation. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and

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RANGE STATEMENT	
regional contexts) may also be included.	
Research techniques may include:	• desk research • informal discussions • internet • interviews • literature reviews
New, emerging and alternative sources of ideas and thinking may include:	• current business theories • government policy • individual in any field of endeavour • innovative organisations • international trends
Critical analysis may involve:	• adapting • analysing and evaluating actions and policies • challenging • clarifying issues, values and standards • comparing analogous situations • comparing and contrasting ideals with practice • comparing and evaluating beliefs, interpretations and theories • developing criteria for evaluation • distinguishing relevant from irrelevant facts • examining and evaluating assumptions • exploring implications and consequences • generating and assessing solutions • debating and discussing • judging • making interdisciplinary connections • making plausible inferences and predictions • noting significant similarities and differences • questioning • reading and listening critically • reflecting
Theoretical perspectives and thinking may be:	• economic • environmental • historical • local, national and international • political • social/cultural
Own professional and personal	• evaluation of contexts in which creativity has

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RANGE STATEMENT	
experience may include:	flourished • evaluation of different attitudes to design and the role of designers • observations of the ways people interrelate with the design process, of the ways people use and adapt designs in daily life • reflection on current political, social and cultural trends • reflection on own experience with any type design process • workplace experience
Benefits to individuals, ***businesses and communities*** may include:	• better individual and business relationships • capacity for innovation and invention • greater social cohesion • improved productivity and profit • psychological wellbeing of individuals and communities
Substantiated positions may be positions which are:	• grounded in appropriate research • result of rational and logical thought • subjected to the analysis of others • supported by relevant information
Clarity of thought and conceptual understanding may be demonstrated by:	• ability to exchange and debate ideas with others • appropriate distillation of ideas to suit the required purpose • audience understanding • clear articulation of ideas

Unit Sector(s)

Unit sector	

Competency field

Competency field	Design - Design Process

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Co-requisite units

Co-requisite units		

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BSBDIV301A Work effectively with diversity

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to recognise and interact productively with diversity in the workplace. It covers sensitive responses to, and interactions with, all manner of diversity that might be encountered during the course of work. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who work in a variety of contexts, where they will be expected to interact with a diverse client and/or co worker population.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Recognise individual differences and respond appropriately	1.1. Recognise and respect ***individual differences*** in ***colleagues***, clients and customers 1.2. Respond to differences sensitively 1.3. Ensure behaviour is consistent with ***legislative requirements*** and ***enterprise guidelines*** 1.4. Accommodate diversity using appropriate verbal and non-verbal communication
2. Work effectively with individual differences	2.1. Recognise and document knowledge, skills and experience of others in relation to team objectives 2.2. Encourage colleagues to utilise and share their specific qualities, skills or backgrounds with other team members and clients in order to enhance work outcomes 2.3. Ensure relations with customers and clients demonstrate that diversity is valued by the business

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • problem-solving and initiative skills to recognise and address own responses to difference.
Required knowledge

• key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • occupational health and safety
• major groups in the community and work environment, as defined by cultural, religious and other traditions and practices
• reasonable adjustments that facilitate participation by people with a disability
• value of diversity to the economy and society in terms of workforce development, Australia's place in the global economy, innovation and social justice.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • adjusting language and behaviour as required by interactions with diversity • awareness of diversity issues • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources

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EVIDENCE GUIDE	
	• examples of diversity issues in the workplace • examples of documents relating to diversity policies and procedures.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of sourcing support about workplace diversity • review of documentation outlining the knowledge, skills and experience of others in relation to team objectives.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • workplace effectiveness units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Individual differences may include:	• ability • age • belief systems/values • culture • expertise/experience/working styles • gender • interests • interpersonal style • language

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RANGE STATEMENT	
	• mental ability • past experiences • physical characteristics • politics • race • religion • sexual orientation • thinking and learning styles
Colleagues may include:	• internal customers • junior staff • managers and supervisors • peers • stakeholders
Legislative requirements may include:	• disability discrimination legislation • human rights and equal opportunity legislation • racial and sex discrimination legislation
Enterprise guidelines may include:	• codes of conduct or ethics • diversity policies • human resources policies and procedures

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Diversity

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBDIV501A Manage diversity in the workplace

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage diversity in the workplace. It covers implementing the organisation's policy on diversity, fostering diversity within the work team, and promoting the benefits of a diverse workplace. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a managerial role who direct the work of others. They may work in any industry context and with teams of variable sizes in the public or private sectors. The unit reinforces the value and benefits of diversity in the workplace. As such, it is of particular value to people working in organisations with staff from different cultures, races or religion, where there are staff members from multiple generations, or where there are other forms of difference in the workforce.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Implement diversity policy	1.1. Locate and review ***diversity*** policy 1.2. Determine its application to the specific work context 1.3. Institute ***actions*** to ensure that the diversity policy is understood and implemented by relevant parties 1.4. Provide feedback and suggestions for improvement to ensure currency and efficacy of diversity policy
2. Foster respect for diversity in the work team	2.1. Address own prejudices and demonstrate respect for difference in personal interactions 2.2. Aim for diversity in selecting and recruiting staff 2.3. Identify and address ***training needs*** to address issues of difference in the team 2.4. Manage tensions and encourage collaboration and respect between staff who struggle to work effectively with difference

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ELEMENT	PERFORMANCE CRITERIA
	2.5. Assist staff to see that working effectively with difference is a strength that can improve the organisation's products, services and customer relations 2.6. Manage allegations of harassment and address ***complaints*** according to established organisational procedures
3. Promote the benefits of diversity	3.1. Promote the organisation's workforce diversity in ***internal and external forums*** to enhance the company's image and reputation 3.2. Capture ideas and information from the diversity in the workforce to enhance products and services and contribute to competitive advantage 3.3. Support organisational efforts to value diversity

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to determine how to make intelligent applications of policy in the work context
- communication skills to:
  - explain and promote the benefits of diversity
  - negotiate differences between staff
  - relate to people from a range of backgrounds
- learning skills to:
  - assist people within the organisation to understand the diversity policy, using different methods to cater for differences in learning styles
  - provide feedback and suggestions for improvement to the diversity policy
  - use ideas and information from the diversity in the workforce to contribute to the organisation's competitive advantage
- self-management, learning and development skills to reflect on and review own prejudices

Required knowledge

- formal and informal complaints procedures
- key features of relevant current legislation, such as:

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REQUIRED SKILLS AND KNOWLEDGE
• Age Discrimination Act • Disability Discrimination Act • Racial Discrimination Act • Sex Discrimination Act • Human Rights and Equal Opportunity Commission Act

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of the application of diversity policy and the capacity to critically review a diversity policy • promotion of strategies to ensure that diversity is understood and respected in the work team • demonstration of compliance with protocols for handling complaints of bullying or harassment.
Context of and specific resources for assessment	Assessment must ensure access to workplace documents and records.
Method of assessment	The following assessment methods are appropriate for this unit: • assessment of reports on diversity policy and policy application • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in performance management • observation of presentations around protocols for handling complaints and bullying or harassment • review of strategies developed to ensure that diversity is understood and respected in the work team • oral or written questioning to assess knowledge of human rights and relevant legislative requirements.
Guidance information for	Holistic assessment with other units relevant to the industry sector,

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EVIDENCE GUIDE	
assessment	workplace and job role is recommended, for example: • BSBMGT502B Manage people performance • BSBHRM501A Manage human resources services • BSBHRM510A Manage mediation processes.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Diversity may relate to:	• any form of difference, such as:
	  • ability, aptitude and disability
	  • age
	  • culture
	  • ethnicity
	  • gender
	  • language
	  • marital status or family arrangements
	  • nationality
	  • personality
	  • race
	  • religion
	  • sexuality.

Actions may include:	• displaying policy on noticeboards and other public areas • distributing copies of policy to staff • explaining policy to staff at meetings or other forums • reinforcing key messages from policy in supervisory discussions, performance appraisals or other interactions.
Training needs may involve:	• cultural competency training • culturally-specific training • diversity training • equal opportunity training

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RANGE STATEMENT	
	• ethics training • grievance management training • human rights training • recruitment and selection training • workplace bullying, discrimination or harassment training.
Complaints may include:	• informal complaints that are managed within the workplace • formal complaints of discrimination or harassment to relevant commonwealth, state or territory anti-discrimination agencies under the federal anti-discrimination laws.
Internal and external forums may include:	• business meetings • conferences and seminars • newsletters and bulletins • professional networks • staff meetings • staff updates.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and leadership - diversity

Co-requisite units

Co-requisite units		

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BSBDIV601A Develop and implement diversity policy

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to research diversity, draft policy, plan for implementation, and implement diversity policy. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit covers the cycle of policy development with a specific focus on diversity and its importance to organisational activity. The policy takes a whole of organisation approach and sees diversity as an asset to the organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Research diversity	1.1. Analyse existing practices and ***information*** in relation to ***diversity*** 1.2. Identify potential benefits of diversity and analyse in relation to ***business objectives*** 1.3. Consult ***key stakeholders*** about their requirements for a diversity policy 1.4. Access diversity policies from similar organisations and review for relevance to own organisation
2. Draft policy and plan for implementation	2.1. Draft ***diversity policy*** 2.2. Develop ***action plans*** for policy 2.3. Consult key stakeholders for feedback on draft policy and action plans 2.4. Determine relationships and links with other related policies 2.5. Revise policy for implementation
3. Implement diversity policy	3.1. Explain and interpret policy to key stakeholders 3.2. Promote policy across the organisation through a range of ***communication channels*** 3.3. Identify intended and unintended impacts of policy implementation 3.4. Develop tools, benchmarks and other indicators for planning and measuring impact of policy

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ELEMENT	PERFORMANCE CRITERIA
	implementation 3.5. Monitor business activities, team plans and staff performance to ensure diversity policy is effectively implemented
4. Review diversity policy	4.1. Gather and analyse information about diversity, the policy and its implementation 4.2. Consult key stakeholders to provide feedback on the policy 4.3. Develop and approve recommendations for changes to the policy 4.4. Refine policy

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- high level research and analytical skills to review business needs and to determine how diversity approaches apply
- interpersonal skills to consult and negotiate with people at all levels, and to present ideas for change and foster support for them
- planning and organising skills to implement and monitor diversity policy.

Required knowledge

- business operations including:
  - familiarity with structure, roles and responsibilities
  - business plans and strategic direction
  - issues that can be linked to diversity
- diversity within the community and business environment:
  - cultures
  - beliefs
  - traditions and practices
- equal opportunity theory
- productive diversity - contemporary theory about diversity and its potential contribution to business advantage

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REQUIRED SKILLS AND KNOWLEDGE

• legislation, codes of practice and national standards, for example:
  • Commonwealth Human Rights and Equal Opportunity Act
  • Commonwealth Racial Discrimination Act/s
  • Commonwealth Sex Discrimination Act
  • Commonwealth Disability Discrimination Act
  • relevant state/territory legislation.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of a comprehensive diversity policy with details of an implementation strategy and how it will be monitored and reviewed OR • critical analysis of an existing diversity policy with an evaluation of its effectiveness and recommendations for improvement • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documents and data.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports evaluating the effectiveness of diversity policies and their implementation • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • review of action plans to support diversity policy

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EVIDENCE GUIDE	
	implementation • review of documentation promoting the policy across the organisation • evaluation of recommendations for policy changes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the BSB60407 Advanced Diploma of Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information may include:	• complaints and grievances e.g. sexual harassment, racial discrimination • customer analysis and feedback • equal opportunity targets • recruitment patterns • stakeholder opinions • statistical data
Diversity includes differences in:	• age • belief systems and values • culture • expertise, experience and working styles • gender • interests • interpersonal style • language, literacy and numeracy • physical differences • politics • race • religion

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RANGE STATEMENT	
	• sexual orientation • thinking and learning styles
Business objectives may include:	• business goals and plans • future directions statements • vision or mission statements
Key stakeholders may include:	• customers and clients • heads of business units • managers and supervisors • organisation executives • staff working in a range of job roles and functions
Diversity policy may include:	• benefits of recognising diversity • human resources practices • key diversity issues for the organisation • organisational vision and purpose about diversity • policies the organisation will commit to • proposed action • reasonable adjustments
Action plans may include:	• financial plans • promotional strategies • resource requirements • risk management issues and strategies • sales and distribution projections • specific actions, initiatives and tasks to be undertaken • staffing/responsibility requirements and arrangements • time lines
Communication channels may include:	• face-to-face meetings • inclusion in training events • internet and intranet • posters, leaflets and fliers • presentations and speeches

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Diversity

Co-requisite units

Co-requisite units		

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BSBDIV701A Develop cross cultural communication and negotiation strategies

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to apply effective cross cultural communication and negotiation skills, and to develop these skills in others, in international education business contexts. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to administrators with managerial responsibility who need to apply sound cross cultural communication and negotiation strategies in their business practice and to develop these skills in others. They will be managing education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Analyse own organisation's international education practices using theoretical models of culture	1.1. Define the key elements of ***culture*** and ***cultural diversity*** from a range of perspectives 1.2. Investigate and analyse interaction between these key elements 1.3. Apply theoretical models of culture and cultural diversity to an international education provider context and own organisational practices
2. Evaluate cultural features of selected countries relevant to the business of education	2.1. Describe ***significant events*** that have shaped the identity of selected countries 2.2. Research and profile ***key characteristics of education and training systems*** in selected countries 2.3. Analyse and describe broad ***cultural differences in learning behaviour*** in selected countries 2.4. Research and evaluate teaching styles, educational

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ELEMENT	PERFORMANCE CRITERIA
	practices, and delivery and assessment methods, in selected countries 2.5. Compare and contrast distinguishing features of ***business practices*** in selected countries
3. Develop cross cultural awareness strategies, and communication and negotiation skills in an international education setting	3.1. Identify and communicate ways in which ***cultural norms in the workplace*** operate to regulate, repress, tolerate and celebrate diversity 3.2. Evaluate potential impact of improved cross-cultural awareness on personal, educational and commercial interactions 3.3. Apply formal and informal coaching and training strategies to improve organisational cross-cultural communication practices and strategies 3.4. Determine appropriate criteria and strategies to evaluate effectiveness of communication and negotiation in an international education setting

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to interact and negotiate in a range of cross-cultural contexts in relation to the business of international education; to interact appropriately with students, co-workers, partners and other stakeholders
- initiative and enterprise skills to take account of cultural contexts, similarities and differences in cross-cultural communication
- learning skills to identify and apply multiple perspectives and interpretations, and appropriate protocols and language
- literacy skills to research academic theories of culture and to present them in plain English
- problem-solving skills to negotiate in difficult and complex situations
- teamwork skills to work effectively with groups and teams
- technology skills to research online and to use libraries for gaining knowledge and information about culture.

Required knowledge

- communication styles and methods, and cultural protocols for use with people from

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REQUIRED SKILLS AND KNOWLEDGE
a range of countries • definitions of culture and cultural diversity based on a number of theoretical models • identification of cultural bias inherent in any conceptual model of culture • implicit and explicit similarities and differences within and between countries and cultures • important cultural features of selected countries • occupational health and safety protocols for interactions with people at work, particularly duty of care requirements • personal cultural assumptions shaping expectations and outcomes • sources of assistance for international students and visitors, including location of and access to interpreters • special types of communications for the international education environment.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • applying cross-cultural knowledge and protocols • effectively communicating with diverse groups and individuals in the work-related environment • knowledge of communication styles and methods, and cultural protocols for use with people from a range of countries.
Context of and specific resources for assessment	Assessment must ensure: • activities are related to an international education context • access to education-related workplace context in which cross-cultural communication and negotiation are required.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

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EVIDENCE GUIDE	
	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate performance in researching issues in international education • evaluation of supervisor's reports on how the candidate applies knowledge of culture and cultural diversity • analysis of projects, responses to problem-based case studies/related task, completed records and reports developed by the candidate • review of analysis of interaction between the key elements of culture and cultural diversity • review of evaluation of teaching styles, educational practices, and delivery and assessment methods in selected countries • evaluation of formal and informal coaching and training strategies applied to improve organisational cross-cultural communication practices and strategies • oral or written questioning to assess knowledge of personal cultural assumptions shaping expectations and outcomes.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • with other units in the qualification in which this unit is packaged.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Culture is:	• '...the set of distinctive spiritual, material, intellectual and emotional features of society or a social group ... it encompasses, in addition to art and literature, lifestyles, ways of living

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RANGE STATEMENT	
	together, value systems, traditions and beliefs ... culture is at the heart of contemporary debates about identity, social cohesion, and the development of a knowledge-based economy.' (UNESCO Universal Declaration on Cultural Diversity 2002)
Cultural diversity is:	• '...the uniqueness and plurality of the identities of the groups and societies making up humankind.' (UNESCO Universal Declaration on Cultural Diversity 2002)
Significant events may include:	• cultural • economic • historical • physical and geographic • political • religious

Key characteristics of education and training systems may include:	• changes and trends
	• cultural, religious and secular influences
	• participation profile and levels
	• statistics on:
	  • enrolments
	  • numbers of years in education (primary, secondary, vocational education and training, higher education)
	  • private and public sector educational expenditure

Cultural differences in learning behaviour may include:	• academic communication:
	  • differences in tentativeness and politeness, confidence and assertiveness
	  • gender differences and acceptance
	  • value given to, and conventions for, questioning of knowledge
	  • ways of arguing (linear and direct, non-linear and indirect)
	• learning styles:
	  • autonomous and self directed learning
	  • collaborative and individual
	  • cooperation and competition
	• concepts of learning and knowledge
	• pedagogical models and practices

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RANGE STATEMENT	

	• peer roles and relationships
	• student-teacher roles and power relationships
	• what is valued in learning process:
	  • acceptance of original contributions and concepts of plagiarism
	  • attitudes to critical analysis
	  • extending or conserving knowledge
	• transforming and creating new knowledge

Business practices may include:	• acceptability of conflict and mechanisms for conflict resolution • communication channels and modes • industrial relations • legal and ethical practices • maintaining 'face' • negotiations • protocols • relationships
Cultural norms in the workplace may include:	• communication practices • levels of formality • pedagogical practices • roles and relationships

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Diversity

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBEBU401A Review and maintain a website

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake data analysis, review website content and update and maintain a website. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who have knowledge of the relationship between web-sites and the core functions of an organisation. They also have working knowledge and skills of performing basic updates to web site content. They may provide administrative support within an organisation or be other individuals who have been delegated this responsibility.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Review website content and use	1.1. Monitor and analyse customer and user feedback in accordance with organisational timelines 1.2. Analyse automatically collected website data and identify trends 1.3. Make recommendations on changes to the website and its content in response to ***feedback and data analysis*** and approve changes scheduled for implementation 1.4. Review cost implications of the recommended changes to determine their viability
2. Update website	2.1. Replace superseded and inaccurate information with current information and add additional material in accordance with organisational requirements 2.2. Follow protocols for ensuring the accuracy and authenticity of information 2.3. Remove services no longer available or required and add new ones in accordance with organisational requirements 2.4. Check ***off-line information*** against that posted on the website and rectify discrepancies in accordance with organisational timelines 2.5. Follow ***security procedures*** for updating the website
3. Carry out non	3.1. Analyse user feedback to confirm that faults have

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ELEMENT	PERFORMANCE CRITERIA
technical site maintenance	resulted from the site and are not user problems 3.2. Rectify faults and make improvements to the site in response to user feedback approved by the organisation 3.3. Add new web pages and/or active links and remove redundant pages and links in accordance with organisational requirements 3.4. Make site changes in response to changes in marketing strategy in accordance with organisational requirements and consideration of cost benefits

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to interpret policies and procedures, provide recommendations to others and to draft text in a logical sequence and structure appropriate for an online format
- numeracy skills for basic statistical analysis of website usage data
- communication skills for consultation with users and customers.

Required knowledge

- identification and overview knowledge of key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
- ethical principles
  - codes of practice
  - privacy laws
  - Occupational Health and Safety
- basic principles of website design and maintenance
- online security issues.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • website and its content continues to meet the requirements of the business after maintenance changes • identification and resolution of faults, errors and/or complaints with website.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and networked computers • documentation relating to analysis and strategies/policies for implementation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • demonstration of techniques in a workplace or simulated environment.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • marketing units • other information and communications technology units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Feedback and data analysis may include:	• feedback in relation to content, ease of navigations and appropriateness/usefulness of content
	• statistical data in relation to usage, including;
	  • hits
	  • page views
	  • visits

Offline information may include:	• information available in other forms, such as; • brochures • databases • knowledge management systems • news letters • records systems
Security procedures may include:	• access protocols • password protected areas

Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - E Business

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Co-requisite units

Co-requisite units		

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BSBEBU501A Investigate and design e business solutions

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. • Amend e-business to ebusiness throughout

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to evaluate e business models and strategies, and to incorporate the results of these evaluations into the design of an e business solution.

Application of the Unit

This unit applies to individuals who possess skills and knowledge in a specialist business area, as well as knowledge of software and other technologies. They apply these skills and knowledge in the evaluation, selection and implementation of new strategies for business, which incorporate e business solutions. They may be managers responsible for overseeing these tasks as well as technical or other knowledge experts.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Investigate e business opportunities	1.1. Undertake a competitive analysis to determine the likely impact ***new capabilities*** will have on industry sectors and competitors 1.2. Complete and assess ***value chain analysis*** to identify ***processes and relationships*** that may benefit from the adoption of ebusiness solutions 1.3. Identify ***threats and opportunities*** to ebusiness implementation and evaluate potential ***contributions to the business*** 1.4. Conduct resource analysis to identify cost and revenue implications in developing opportunities 1.5. Identify and evaluate legal and ethical issues relating to ebusiness opportunities
2. Evaluate e business models	2.1. Identify and analyse ***business-to-business***, ***business-to-consumer***, intra-organisational ebusiness applications and ***ebusiness models*** 2.2. Rank compatible ebusiness models in terms of their strengths and weaknesses, considering resourcing, technical and security requirements of each 2.3. Assess cost implications of implementation of ebusiness models 2.4. Determine an ebusiness model most appropriate in relation to business plan
3. Design an e business	3.1. Formulate purpose, objectives and values for the ebusiness 3.2. Identify target market, and value chain structure in accordance with chosen ebusiness model 3.3. Identify and obtain ***technical needs and expertise*** required to implement ebusiness model

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Investigate and develop plan to address culture change issues to manage transition to an ebusiness
4. Implement an e business strategy	4.1. Develop ***policies and guidelines*** to support customers, supply chain and staff to ensure successful implementation 4.2. Monitor performance of business goals and adjust policies and procedures to respond to changing needs of customers, staff and supply chain 4.3. Review ebusiness systems and models, seeking feedback from users and personnel responsible for ebusiness implementation 4.4. Incorporate evaluation results and feedback to improve future ebusiness strategies

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical and problem-solving skills to assess information and apply to identified business needs
- communication skills to collaborate with technical experts and other staff
- literacy skills to identify and interpret market and product information.

Required knowledge

- features of a range of software and hardware systems
- key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - copyright
  - occupational health and safety
- organisational policies and procedures relating to the systems, products and/or service being worked with.

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Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • evaluation of ebusiness opportunities involving new business models and not simply electronic versions of existing businesses • rationale and supporting evidence for choice of ebusiness solution • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and networked computers • documentation relating to analysis and strategies/policies for implementation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • demonstration of techniques in a workplace or simulated environment.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBEBU502A Implement ebusiness solutions • IT use units.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

New capabilities may include:	• 24-hour operation • automated marketing efforts • communication • distribution channel • global reach • online customer service • online inventory • online payments • online purchasing • online sales systems • supply chain

Value chain analysis may include:	• an analysis of a series of primary activities, such as:
	  • inbound logistics
	  • marketing and sales
	  • operations
	  • outbound logistics
	  • service support
	• and their support activities, such as:
	  • business infrastructure
	  • human resources management
	  • procurement
	  • technological development

Processes and relationships may include:	• customer service • delivery of core services • delivery of government services • delivery of products • development of new products, services and markets • organisational structures • trading communities
Threats and opportunities may include:	• business to government (B2G) opportunities where ebusiness is conducted between an enterprise and the government

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	• business-to-business (B2B) opportunities where ebusiness is conducted between companies • business-to-consumer (B2C) opportunities where ebusiness is conducted between an enterprise and a customer • competition legislation • disintermediation threats/opportunities where the role of 'middlemen' or other middle supply chain elements is reduced or made redundant as newer more efficient supply chain technologies are implemented • infrastructure requirements: disaster recovery, failsafe systems • internal business opportunities that improve productivity utilising ebusiness development • re-intermediation opportunities, where ebusiness creates new value between producers and consumers • risk management: payments, fraud etc.

Contributions to the business may include:	• effect on:
	  • customer satisfaction ratings
	  • growth
	  • market share
	  • profitability
	  • return on investment
	  • sales
	  • staff morale i.e. using efficient technologies to enhance workplace
	  • staff productivity and professional development

Business-to-business may include:	• involves ebusiness between organisations • may be B2G (business to government)
Business-to-consumer may include:	• involves ebusiness between an enterprise and a customer
E-business models may include:	• aggregator models • collaboration partners • competitor cooperation model • e-auction • e-government • e-mall • e-office

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	• e-procurement • e-shop/e-tailing • information brokers • micro-payments business model • multilevel marketing • portal • tender services • third party marketplaces • trust services • value chain integrators • value chain service providers • virtual community • web rings
Technical needs and expertise may include:	• advice on existing business strategy and base business versus growth business • advice on staffing arrangements • advice on technology issues/compatibility • banking information for electronic funds transfer • contact person • feedback loops • new protocols relating to legal or security issues for ebusiness • open and international standards e.g. EAN.UCC or UN/EDIFACT • personal identification and password for online access to business processes e.g. purchasing or supply
Policies and guidelines may include:	• business ethics • confidentiality • electronic communication • fraud prevention and detection • human resources management • information management • intellectual property • legal issues e.g. jurisdiction, contract validity, taxation • outsourcing • performance management • privacy • risk management • security

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Unit Sector(s)

Information and Communications Technology - E Business

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BSBEBU502A Implement e business solutions

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to implement e business solutions, including establishing the initial requirements and developing systems for implementation, and to support ongoing monitoring and review. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who possess skills and knowledge in a specialist business area, as well as knowledge of software and other technologies. They apply these skills and knowledge in the implementation of e business solutions. They may be managers responsible for overseeing these tasks as well as technical or other knowledge experts.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Set up e business solution	1.1. Identify ***organisational requirements*** in consultation with relevant personnel 1.2. Evaluate security issues and rank these issues for acceptable risk 1.3. Evaluate the costs and technology requirements associated with ***e-business solution*** in relation to organisational requirements 1.4. Confirm technology and standards required for implementation with relevant personnel 1.5. Prepare budget for implementation of solution
2. Implement e business solution	2.1. Delegate responsibility for solution in accordance with organisational policy, procedures and structures 2.2. Develop procedures for the solution in accordance with organisational and ***other business requirements*** 2.3. Provide training for implementation of solution in accordance with organisational requirements 2.4. Develop ***security procedures and protocols*** in accordance with organisational requirements 2.5. Maintain records relating to solution in accordance with legal, ethical and accounting requirements

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ELEMENT	PERFORMANCE CRITERIA
3. Monitor and review e business solution	3.1. Monitor outcomes and processes in accordance with implementation strategy and established performance monitoring and reporting requirements 3.2. Use business data and reports to compare plans, budgets, time lines and forecasts to actual performance 3.3. Obtain feedback from users and personnel responsible for implementation, and make recommendations to improve future e-business strategies

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical and problem-solving skills to assess information and apply to identified business needs
- communication skills to collaborate with technical experts and other staff
- literacy skills to identify and interpret market and product information.

Required knowledge

- features of a range of software and hardware systems
- key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - copyright
  - occupational health and safety
- organisational policies and procedures relating to the systems, products and/or service being worked with.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documented processes and procedures for implementation of an e-business solution • development of monitoring strategy • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and networked computers • documentation relating to policies, procedures and training developed.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • demonstration of techniques in a workplace or simulated environment..
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBEBU501A Investigate and design e-business solutions • other information and communications technology units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Organisational requirements may include:	• authentication • building security • confidentiality • cost • encryption technology • firewalls • fraud control • gatekeeper software • privacy • recognised internet service provider (ISP) with secure platform • secure web server and browser with secure sockets layer (SSL) • third party verification of credit card information
Security issues may include:	• business ethics • confidentiality • fraud prevention and detection • information management • intellectual property • legal issues e.g. jurisdiction, contract validity, taxation • privacy • risk management • security
E-business solutions may include:	• 24-hour operation • automated marketing efforts • communication • distribution channel • global reach • online customer service • online inventory • online payments

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RANGE STATEMENT	
	• online purchasing • online sales systems • supply channel
Other business requirements may include:	• accounting • ethical • legal • policies, procedures and guidelines developed in other operational areas specific to the system being implemented
Security procedures and protocols may include:	• authentication confirmation of identity • establishing and/or monitoring the credit worthiness of clients • processes for monitoring expiry of credit cards • processes for preventing fraudulent use of credit cards • processes for minimising bad debts through online payments

Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - E Business

Co-requisite units

Co-requisite units		

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BSBEDU301A Assist with monitoring compliance in international education services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assist in monitoring compliance with relevant legislation, regulations, finance and insurance requirements in international education services administration work roles. It emphasises processes which relate to client services, especially reviewing and reporting on compliance. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals carrying out administration work, under supervision and guidance, in an international education environment. They could work in the administration of education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Communicate legislative and regulatory obligations to organisation, clients and stakeholders	1.1. Acquire and apply knowledge of ***relevant legislation and regulations*** to assist with ensuring compliance 1.2. Use organisational compliance systems and procedures to identify compliance information required by relevant legislation and regulations 1.3. Prepare and have checked, in line with organisational procedures, information regarding legislative obligations for dissemination to a range of ***international clients and stakeholders*** 1.4. Provide legislation-related information to international students to inform them of their obligations and to confirm their understanding of requirements

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ELEMENT	PERFORMANCE CRITERIA
	1.5. Provide information about legislative and regulatory obligations to clients and stakeholders in a ***range of formats***
2. Contribute to processes for compliance with legislative and regulatory requirements	2.1. Identify organisation's student ***monitoring*** and ***reporting*** processes 2.2. Identify ***online processes*** for monitoring and reporting 2.3. Follow operational procedures for administration roles in relation to ***insurance and financial requirements*** 2.4. Contribute to ***case management*** in relation to organisational reporting procedures 2.5. Take appropriate and timely remedial action through organisational channels in instances of non-compliance
3. Review processes for compliance with legislative and regulatory requirements	3.1. Assist with reviewing processes and policies for student monitoring and reporting 3.2. Review and recommend updates to policies and procedures for legislative and regulatory compliance, in line with work role 3.3. Make approved adjustments to operating procedures in response to changes in legislative and regulatory compliance policies and procedures
4. Interact with stakeholders and groups external to the organisation	4.1. Identify contact information for ***government agencies and other relevant bodies*** in relation to compliance requirements 4.2. Develop communication strategies for interaction with government agencies and other relevant bodies 4.3. Apply protocols for liaison and information sharing

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to interact effectively in an intercultural context with clients, co-workers and other stakeholders; to provide accurate advice to students and other clients; to provide relevant information on compliance-related matters

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REQUIRED SKILLS AND KNOWLEDGE
• initiative and enterprise skills to acquire and apply industry knowledge to work situations and activities; to follow and contribute to development of organisational procedures • learning skills to interpret legislation and other documentation relevant to work role, particularly the Education Services for Overseas Students (ESOS) Act 2000 and Department of Immigration and Citizenship (DIAC) guidelines • literacy skills to record information on updated government regulations and guidelines, and to refer to relevant legislative and regulatory frameworks • numeracy skills to compile student compliance records and trends • planning and organising skills to prepare information about legislative and regulatory requirements • problem-solving skills to prepare information about specific student issues and visa compliance • self-management skills to perform tasks efficiently and on time in an international education services compliance context • technology skills to use a computer and other office equipment to access information, to produce documents and to communicate in an international education services compliance context.
Required knowledge
• applicable aspects of the current Australian Quality Training Framework (AQTF) Standards for Registered Training Organisations • child protection legislation in relation to the welfare of, and training of, students under 18 years of age • communication styles and methods • international education environment and specific organisational work environment and work practices • legislation and regulatory requirements governing occupational health and safety (OHS), workplace relations and anti-discrimination in various jurisdictions • legislation governing Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) registration • legislation governing student visa compliance and international education services such as the ESOS Act and regulations, and any subsequent amendments or versions • reporting requirements • quality review processes • relevant administration procedures for student fees.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying and applying legislative and regulatory compliance requirements in relation to international education services at a level required for effective performance of work role • communicating and working with clients from culturally diverse backgrounds • knowledge of relevant legislative and regulatory requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents, and monitoring and reporting mechanisms.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports • analysis of projects, case studies, completed records and reports developed by the candidate • review of information provided to clients and stakeholders about legislative and regulatory obligations • review of action taken in instances of non-compliance • evaluation of updates recommended to policies and procedures for legislative and regulatory compliance • review of communication strategies developed for interaction with government agencies and other relevant bodies • oral or written questioning to assess knowledge of quality review processes.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Relevant legislation and regulations may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:
	  • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance
	  • business compliance relevant to work roles
	  • ESOS Act, subsequent amendments and related legislation
	  • employment, education and training - relevant to onshore and offshore provision
	  • environmental issues
	  • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT)
	  • National Code of Practice for Registration Authorities and Providers of International Education and Training

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RANGE STATEMENT	
	• OHS • privacy and confidentiality • Transnational Quality Strategy (2005) • workplace employment practices and industrial relations • National ELT Accreditation Scheme (NEAS) standards for young learners and for teaching English language to international students • Overseas Student Tuition Assurance Scheme (OSTAS) regulations • quality assurance guidelines set by particular organisations e.g. for cultural diversity, equity and access, critical incidents and workplace practices
International clients and stakeholders may include:	• accommodation providers • dependants of international students • financial, superannuation, insurance organisations • government departments and agencies • international students • organisational personnel • parents of international students • professional associations • recruitment agent
Range of formats may include:	• business correspondence • email updates • information included in marketing material • information sessions • oral presentations • printed brochures • student and staff handbooks • website bulletins or newsletters
Monitoring may include:	• accessing student progress data • liaising with staff to determine student progress • meeting students on an individual basis to communicate legislative obligations • processes for business and financial reporting • processes to monitor provider compliance under Section 5 of the ESOS Act • processes to monitor registered training provider compliance under the AQTF

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RANGE STATEMENT	
	Standards for Registered Training Organisations (RTO), where applicable • recording student attendance • representing students if necessary on progress committees • reviewing student progress
Reporting may include:	• informing DIAC of student visa breaches via PRISMS • processes for dealing with non-compliance • processes for financial reporting and business returns • processes to comply with the organisation's CRICOS registration • processes to comply with the organisation's RTO registration, where applicable
Online processes may include:	• accessing and reporting on the PRISMS system for student enrolments, progress and approval of welfare arrangements • locating student progress data using institutional databases • lodging business returns • paying accounts, loans, insurance premiums • paying employees
Insurance and financial requirements may include:	• asset insurance • OSTAS regulations • overseas student health cover arrangements • personal accident or illness insurance (for self-employed people) • professional indemnity • public liability • refund processes and requirements under legislation and institutional policies • remuneration, superannuation, taxation requirements • student fees administration • vocational placement (if applicable) • workers compensation
Case management may include:	• coordinating group discussion to resolve issues • processes to assist a student to access support • referring to specialised roles to resolve issues
Government agencies and other	• DEST

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RANGE STATEMENT	
relevant bodies may include:	• DIAC • educational institutions • employer, employee organisations • financial, superannuation, insurance organisations • overseas student health cover providers • professional associations • state/territory governments and training authorities

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU302A Assist in resolution of issues and incidents in an international education environment

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to contribute to the resolution of issues and incidents in an international education environment. It emphasises applying processes to appropriately deal with day to day issues and incidents, as well as serious issues and critical incidents, including providing support to clients and others. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals carrying out administration work, with some supervision and guidance, in an international education environment. They could work in the administration of education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and public or private.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Contribute to issue resolution and incident response processes	1.1. Deal effectively with ***day-to-day issues*** and ***day-to-day incidents*** 1.2. Identify and follow organisational policies and procedures for dealing with critical incidents 1.3. Contribute to the resolution of ***serious issues*** 1.4. Contribute to response processes in the event of ***critical incidents*** 1.5. Assess own responses and seek assistance if needed and as guided by supervisor, manager or ***external parties***/***professionals*** 1.6. Use appropriate initiative in the event of a critical incident, with due regard for own health and safety and that of others, and organisational requirements 1.7. Contribute to debriefing procedures after an issue/incident

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ELEMENT	PERFORMANCE CRITERIA
2. Contribute information for distribution to those affected by issues and incidents	2.1. Identify types of information required for issues and incidents 2.2. Collect and collate current, relevant information from ***appropriate sources*** 2.3. Maintain accessible files of current, relevant information 2.4. Develop and maintain an accessible comprehensive ***network contacts list*** 2.5. Review and update information on a regular basis 2.6. Record and report information, in accordance with ***legislative and regulatory compliance requirements*** and organisational procedures
3. Communicate effectively with those affected by issues and incidents	3.1. Assess situation according to organisational policy 3.2. Use ***communication strategies*** appropriate for individual situations, in line with organisational requirements 3.3. Communicate effectively with ***clients of the organisation*** and other ***relevant stakeholders*** when dealing with issues and critical incidents 3.4. Arrange access to counsellors or other support people if and when required
4. Contribute to records and team reports on issues and incidents	4.1. Establish sensitivity of information and level of confidentiality required, in reporting issues and incidents 4.2. Participate in team activities for assessing details of progress and outcomes of issues and incidents 4.3. Interact and consult with team members to record and report on issues and incidents 4.4. Contribute to the debriefing process with teams and individuals including referring to network contacts as applicable
5. Contribute to development of organisational policies and procedures for the resolution of issues and incidents	5.1. Apply relevant organisational policies and procedures for the resolution of issues and incidents 5.2. Review organisational policies and procedures relevant to specific issues and incidents, with appropriate organisation officers 5.3. Suggest adjustments to organisational policies and procedures based on outcomes reports
6. Provide advice to clients in resolving issues and incidents	6.1. Establish or contribute to protocols and processes for resolving issues and dealing with incidents 6.2. Apply appropriate advisory processes according to

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ELEMENT	PERFORMANCE CRITERIA
	individual client needs 6.3. Communicate processes to relevant stakeholders 6.4. Consult with relevant stakeholders to evaluate process outcomes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to interact effectively and appropriately in an intercultural context with clients, co-workers and stakeholders dealing with incidents and issues relevant to work role; to be assertive as the situation requires, applying conflict resolution skills, including negotiation; to remain calm and controlled under pressure
- initiative and enterprise skills to set and maintain boundaries, to prioritise activities, to follow organisation policy and procedures, and to review and adjust policy and procedures with others
- learning skills to access and identify requirements in relation to compliance with legislation, particularly regarding occupational health and safety (OHS), privacy and confidentiality
- literacy skills to accurately record information, noting key facts and recording resolution processes; to prepare reports on incidents and related issues
- planning and organising skills to develop network contact lists and details; to record and file relevant information for ease of retrieval
- problem-solving skills to take action and to make referrals appropriate to the situation, own job role and responsibilities
- self-management skills to provide, identify and manage own responses; to apply appropriate responses to the specific situation
- technology skills to use a computer to access information online; to operate equipment such as fire extinguishers.

Required knowledge

- international education environment, student services requirements and workplace communication in line with work role specifications
- legislative and regulatory requirements including:
  - legislation and regulations governing overseas students studying in Australia or offshore under the auspices of an Australian organisation
  - other work-related legislation including OHS, privacy and confidentiality,

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REQUIRED SKILLS AND KNOWLEDGE

security anti-discrimination, business legislation relevant to work role
• recognising own roles and responsibilities in the following types of incidents:
  • reporting crime, injury, serious or contagious illness or death
  • delivering sensitive information
  • dealing with academic difficulties or failure, breaches of confidentiality, unexplained absence of students, harassment, threats to personal safety and health problems
• types of issues that could concern international students such as:
  • student wellbeing and welfare such as cultural adjustment, cross-cultural communications and expectations, illnesses, accidents, mental health problems, accommodation, financial matters, loneliness and isolation
  • course-related issues such as student progress, access to services, English language and other support
  • grievances and concerns such as assessment and marking concerns, bullying or intimidation, crimes, property and personal security issues
  • compliance related issues such as non-attendance or insufficient attendance, visa non-compliance, interruption of studies
  • staffing related issues such as professional limitation of staff responsibility and parameters of roles, staff performance, student/teacher workplace behaviour expectations, differentiation among staff roles and managing staff workloads, time and resources.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • responding effectively and appropriately to issues and critical incidents in an international education environment, in line with work role levels, organisational requirements, and legislative and regulatory requirements • contributing to organisational capacity to respond to critical incidents • knowledge of relevant legislative and regulatory

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EVIDENCE GUIDE	
	requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports • analysis of projects, case studies, completed records and reports developed by the candidate • review of team member feedback regarding initiative taken during a critical incident • oral or written questioning to assess knowledge of types of issues that could concern international students • review of assessment of own responses and assistance sought • review of network contacts list • evaluation of suggested adjustments to organisational policies and procedures • review of contributions made to protocols and processes for resolving issues and dealing with incidents.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work

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RANGE STATEMENT	
situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Day-to-day issues may include:	• academic and educational issues • accommodation and welfare issues • cultural adjustment issues • financial issues • minor illness • non-compliance situations • training and assessment issues • work role issues
Day-to-day incidents may include:	• conflict • delivering sensitive information • harassment • non-compliance situations • theft • unexplained absence of students
Serious issues may include:	• academic failure • accommodation issues • delivering serious and sensitive information • grievance issues • harassment or bullying • mental health issues • non-compliance issues
Critical incidents may include:	• accidents • crime affecting clients or workers • death • disappearance of students • incidents involving mental health problems • serious or contagious illness
External parties/***professionals*** may include:	• counsellors • emergency services personnel e.g. ambulance, fire brigade, police • interpreters
Appropriate sources may include:	• organisational personnel • professional association • relevant government and agency personnel, and internet websites
Network contacts list may include:	• community services e.g. external crisis or counselling agencies

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RANGE STATEMENT	
	• consular staff • counsellors • emergency services personnel e.g. ambulance, fire brigade, police • employer organisations • homestay providers • hospitals • interpreters • organisational officers • overseas recruitment agents • parents • unions

Legislative and regulatory compliance requirements may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:
	  • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance
	  • business compliance relevant to work roles
	  • Education Services for Overseas Students (ESOS) Act 2000, subsequent amendments and related legislation
	  • employment, education and training - relevant to onshore and offshore provision
	  • environmental issues
	  • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT)
	  • National Code of Practice for Registration Authorities and Providers of International Education and Training
	  • OHS
	  • privacy and confidentiality
	  • Transnational Quality Strategy (2005)
	  • workplace employment practices and

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RANGE STATEMENT	
	industrial relations • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices
Communication strategies may include:	• adapting communication style to fit the situation • immediately contacting the person responsible for workplace health and safety • maintaining a calm, controlled demeanour • recording key information in notes • referring people to counselling or interpreting services • referring people to safe areas or responsible personnel • telephoning the duty officer or person responsible if the incident occurs after hours • telephoning the ambulance, fire brigade or police in an emergency if the responsible organisational officer is not present or available to do so

Clients of the organisation may include:	• internal clients e.g. section, department and faculty staff
	• international student cohort
	• other clients of the organisation such as:
	  • consular staff
	  • education and migration agents
	  • government and private organisations, departments and agencies
	  • homestay providers
	  • other educational organisations
	  • parents or other relatives of students

Relevant stakeholders may include:	• agents • consular staff • government or agency personnel • homestay providers • organisation personnel • parents • students

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU303A Assist with the provision of international education information

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to organise, maintain and provide information and material relating to education and training programs and associated services to clients of an international education organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals providing information to clients, with some supervision and guidance, in an international education environment. They could be working in the administration of education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Establish client requirements for information provision	1.1. Apply cross-cultural communication skills in providing and receiving ***information***
	1.2. Record and respond to requests for information from internal or external ***clients***, in line with ***organisational policies and procedures***
	1.3. Clarify requests to ensure full understanding of client requirements
2. Organise and maintain supplies of material	2.1. Refer to procedures for providing material for planning production, assembly, packaging and distributing information packages
	2.2. Assemble material for the needs of individual clients and client groups, according to inventory establishment
	2.3. Maintain stocks of material at established inventory

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ELEMENT	PERFORMANCE CRITERIA
	levels, and identify and respond to shortfalls 2.4. Facilitate production and collection of material to ensure inventory levels are maintained
3. Provide information relevant to individual clients and client groups	3.1. Provide assembled and checked material to clients at the specified destinations on time, according to organisational policies and procedures 3.2. Facilitate compliance with ***relevant legislative and regulatory requirements*** for provision and distribution of material 3.3. Monitor communication and process flow to ensure on-time despatch of requested material to specified persons and destinations 3.4. Seek advice from ***relevant personnel*** in client services situations or issues where information provision may require departure from regular practices
4. Contribute to the continuous improvement process for information provision	4.1. Apply client services policy, guidelines and procedures for information provision when performing work role activities 4.2. Perform work effectively within a team environment to facilitate quality of information provision in client services 4.3. Carry out follow-up to gauge client satisfaction regarding information provision 4.4. Use feedback to promote continuous improvement in own work and for input into organisational quality client services processes for information provision 4.5. Provide input through team communication regarding organisational policies and procedures development or review of information provision services to clients

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to interact effectively in an intercultural context with clients,

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REQUIRED SKILLS AND KNOWLEDGE
co-workers, team members and other stakeholders; to effectively communicate cross-culturally with clients; to clarify information through discussion and feedback with clients and other stakeholders, including team members • initiative and enterprise skills to work effectively within the organisation's client services policy and according to established procedures for information provision; to identify areas for improvement in own work performance and to adjust work practices; to deal with change and contingencies that arise when conducting client services and information provision activities • learning skills to understand and comply with legislative and regulatory requirements relating to information provision in an international education environment • literacy skills to record information on updated government regulations and guidelines; to refer to relevant legislative and regulatory frameworks • numeracy skills to complete orders for supply of information • problem-solving skills to access information and resources for information provision; to distinguish between problems that can be solved within work role authority and those that must be passed on to supervisors or managers • planning and organising skills to maintain supplies of material and plan own daily work schedule in accordance with job role • self-management skills to provide requested information under the approval of supervisor, and according to job role and organisational procedures • technology skills to efficiently use a computer and other office equipment to access information, produce documents and communicate.
Required knowledge
• client services information provision job roles in an international education organisation • information organisation, maintenance and provision in international education organisations including legislative and regulatory compliance issues • organisational policies and procedures • quality client services policy, principles and practices for providing information to internal and external clients of an international education organisation • types and purpose of client information requirements.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • performing client information services work role duties and tasks within international education organisational policy guidelines and following established client services procedures • knowledge of relevant legislative and regulatory compliance issues.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports on how the candidate provides information to clients • analysis of projects, case studies, completed records and reports developed by the candidate • review of records of requests for information from internal or external clients • evaluation of maintenance of material stocks and response to shortfalls • review of assembledmaterial provided to clients • evaluation of follow-up carried out to gauge client satisfaction regarding information provision • oral or written questioning to assess knowledge of organisational policies and procedures • observation of providing information to individual clients and client groups.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Information may include:	• cross-cultural communication and cultural information such as:
	  • cultural events schedules and invitations
	  • organisational policies relating to international education
	  • student support programs and schedules, staff support programs
	• information for agents and other clients such as:
	  • any partner institution information
	  • costs, refund and grievance procedures
	  • English language requirements for prospective applicants and government guidelines and regulations relating to the Education Services for Overseas Students (ESOS) Act 2000
	  • marketing and recruitment information, travel schedules, accurate course and campus information, student services information
	  • study tour schedules and agreements
	  • updated agreements and renewals of contracts
	• information for staff such as:
	  • ESOS Act legislation and compliance information
	  • lists of commencing students, information about completing students, marketing and recruitment material, admissions and enrolment procedures and schedules
	• oral, written or packaged information requested by or distributed to clients and other stakeholders, and approved in accordance with organisational policies and procedures

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RANGE STATEMENT	

	• student information such as:
	  • compliance information including attendance, visas
	  • course and organisation information including translated brochures, campus information, information about living in Australia, academic conventions and learning strategies, student support programs, accommodation options and contacts, costs of participation, other expenses and money
	  • cultural adjustment and support information including orientation, support programs, services and specialist staff
	  • information to support returning home and post-course adjustment
	  • on-arrival services information including airport reception, contingencies contacts, campus maps, faculty and service contacts, student notice board information, course materials and library services
	  • pre-departure and application and enrolment procedures including electronic confirmation of enrolment (ECOE) documentation, overseas student health cover requirements

Clients may include:	• internal clients such as section, department, faculty staff
	• international students and candidates
	• other clients of the organisation:
	  • consular staff, overseas agents
	  • government and private organisations, departments and agencies
	  • homestay providers
	  • parents of students
	  • other educational organisations

Organisational policies and procedures may include:	• written documentation on information provision in client services
Relevant legislative and regulatory requirements may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:

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RANGE STATEMENT	
	• anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance • business compliance relevant to work roles • ESOS Act and subsequent amendments and related legislation • employment, education and training - relevant to onshore and offshore provision • environmental issues • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT) • occupational health and safety • privacy and confidentiality • use of Provider Registration and International Student Management System (PRISMS) database • workplace employment practices and industrial relations • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices
Relevant personnel may include:	• managers • supervisors • team members • other stakeholders related to information provision

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU304A Assist with the provision of pastoral care services to international students

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assist with the provision of pastoral care services to students of an international education organisation. It focuses on the support needs of international students studying on student visas in Australian institutions, onshore and offshore. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals providing pastoral care services to international students, with some supervision and guidance, in an international education provider context. They will be working in the administration of education programs and projects in one or more international education sectors (schools, English language teaching organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and public or private.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify pastoral care needs of international students	1.1. Identify potential pastoral care services requirements of ***student groups and individuals*** 1.2. Identify organisational risk management strategies in relation to providing pastoral care services 1.3. Review organisational surveys of international student expectations and needs
2. Provide advice to international students to meet pastoral care needs, within role parameters	2.1. Identify limitations and parameters of own role in relation to ***pastoral care specialisations*** for international students 2.2. Apply cross-cultural communication skills when assisting in a range of ***student advisory settings*** 2.3. Refer students to personnel in pastoral care specialisations as applicable 2.4. Communicate information about international student support programs and services to students

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ELEMENT	PERFORMANCE CRITERIA
	2.5. Apply negotiation skills when dealing with difficult situations, in line with role and organisational requirements 2.6. Manage student information and records in compliance with privacy and confidentiality standards 2.7. Consult and debrief with work colleagues
3. Identify compliance with legislative and regulatory requirements, and organisational policies and procedures	3.1. Identify ***legislative and regulatory requirements*** in relation to pastoral care services 3.2. Identify organisational policy and procedures in relation to pastoral care services 3.3. Review compliance with education and training industry standards and codes, in relation to pastoral care services, and report in line with organisational procedures 3.4. Identify and propose adjustments to organisational pastoral care policies and procedures to meet the needs of international students, and report in line with organisational procedures
4. Communicate pastoral care services to clients and stakeholders	4.1. Identify appropriate ***external pastoral care services*** and document their contact and service details 4.2. Prepare information about pastoral care services for international students that identifies pastoral care specialisations and external pastoral care services 4.3. Disseminate information about pastoral care services to international students in ***appropriate formats*** 4.4. Communicate information on organisational policies and procedures to clients and stakeholders 4.5. Review and monitor access to information and uptake of pastoral care services by international students 4.6. Identify and propose improvements to communication processes, formats and strategies
5. Contribute to continuous improvement in pastoral care services	5.1. Record and maintain student case notes, in line with organisational requirements 5.2. Develop appropriate ***student support programs*** 5.3. Review student uptake of pastoral care services 5.4. Conduct student satisfaction surveys and make recommendations 5.5. Identify and propose improvements in relation to

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ELEMENT	PERFORMANCE CRITERIA
	access to and provision of pastoral care services

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to interact effectively in an intercultural context with clients, co-workers and other stakeholders; to effectively gather, convey and receive information; to act on advice and information; to use effective questioning and active listening techniques; to apply appropriate cross-cultural communication techniques, overcome communication barriers, and give and receive feedback • initiative and enterprise skills to handle sensitive issues and matters; to monitor compliance with legislation, regulations and standards for pastoral care services • learning skills to improve own skills and performance in areas relevant to provision of pastoral care services at required level of operation • literacy skills to produce reports and maintain records • planning and organising skills to maintain information about pastoral care services and programs • problem-solving skills to interpret student requirements and to match with suitable pastoral care services • technology skills to use a computer and other office equipment to access information, to produce documents and to communicate e.g. maintaining records, preparing professional reports.
Required knowledge
• aspects of pastoral care services offered in a range of international educational organisations • cross-cultural communication principles and protocols • impact and influence of culture on international student support and pastoral care services • international education services environment • limitations of responsibility and parameters in terms of pastoral care and incidents • organisational policies and procedures • positions and work roles of organisation including responsibilities of pastoral care role, team role and roles of student learning support and counselling services • principles and practices of client services and continuous improvement • programs for international student support • relevant legislation and regulations relating to international education services such

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REQUIRED SKILLS AND KNOWLEDGE

as child protection, occupational health and safety (OHS), privacy, security
• types of issues that could concern international students such as:
  • student wellbeing and welfare such as cultural adjustment, cross-cultural communications and expectations, illnesses, accidents, mental health problems, accommodation, financial matters, loneliness and isolation
  • course-related issues such as student progress, access to services, English language and other support
  • grievances and concerns such as assessment and marking concerns, bullying or intimidation, crimes, property and personal security issues
  • compliance related issues such as non-attendance or insufficient attendance, visa non-compliance, interruption of studies
  • staffing related issues such as professional limitation of staff responsibility and parameters of roles, staff performance, student/teacher workplace behaviour expectations, differentiation among staff roles and managing staff workloads, time and resources.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • effectively communicating cross-culturally with students of an international education organisation • providing relevant information and advice to groups and individuals about the provision of pastoral care services to students of an international education organisation, at the appropriate work role level • knowledge of relevant legislation and regulations relating to international education services.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess

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EVIDENCE GUIDE	
	practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports on how the candidate applies cross-cultural communication skills when assisting in a range ofstudent advisory settings • analysis of projects, case studies, completed records and reports developed by the candidate • review of management of student information and records • review of documentation outlining external pastoral care servicescontact and service details • analysis of information prepared about pastoral care services for international students • oral or written questioning to assess knowledge of limitations of responsibility and parameters in terms of pastoral care.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units • customer service units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Student groups and individuals may include:	• international students in: • English Language Intensive Courses for Overseas Students (ELICOS) centres • institutes and private colleges • pre-university and bridging programs

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RANGE STATEMENT	
	• primary and secondary schools • universities • students who could have specific support needs: • first year students • postgraduate students • students identified as being at risk • students under 18 years of age • students with dependents
Pastoral care specialisations may include:	• academic course advice • accommodation advice and information, including homestay programs • careers counselling • chaplaincy services • disability services • financial advice • international student advice • language and learning support • medical and health services • residential advisory services • student counselling
Student advisory settings may include:	• formal information provision and advisory sessions such those provided during orientation programs, lectures and tutorials • individual advisory sessions being conducted by qualified student counsellors or advisors • small group sessions for disseminating information and discussion
Legislative and regulatory requirements may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to: • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance • business compliance relevant to work roles • Education Services for Overseas Students (ESOS) Act 2000, and subsequent amendments and related legislation • employment, education and training - relevant to onshore and offshore provision

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RANGE STATEMENT	
	• environmental issues • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT) • National Code of Practice for Registration Authorities and Providers of International Education and Training • OHS • privacy and confidentiality • Transnational Quality Strategy (2005) • workplace employment practices and industrial relations • National ELT Accreditation Scheme (NEAS) standards for young learners and for teaching English language to international students • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices
External pastoral care services may include:	• community support services such as interpreters • ethnic support groups • gambling and drug-related support services • mental illness services • religious groups • telephone counselling emergency and crisis support services
Appropriate formats may include:	• fact sheets and brochures • handouts for discussion and group sessions • information printed in languages other than English • information adapted for younger students • online information and news updates • video and MS PowerPoint presentations for face-to-face formal information sessions
Student support programs may	• community links programs

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RANGE STATEMENT	
include:	• crime awareness and prevention programs • cultural support programs • first year support programs • homestay programs • orientation programs • peer support and mentoring programs • postgraduate programs • pre-departure programs • returning home programs • spouse and dependent support programs

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU305A Assist with international education events and programs

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide assistance and support to a team, coordinators and managers in planning, conducting and providing information about events and programs in an international education organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who assist others to organise events and programs in an international education provider context, with some supervision and guidance. They could be working in administration of education programs and projects in one or more international education sectors (schools, English language teaching organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and public or private.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Assist in planning events and programs for international clients and other stakeholders	1.1. Participate in team meetings to plan ***events and programs*** 1.2. Clarify and record team roles, own work role and task responsibilities 1.3. Identify and record requirements for information, material and services during the planning stages 1.4. Complete planning-related tasks on time and in accordance with team and work role requirements 1.5. Implement ***organisational policy and procedures*** for facilitating at international education events and programs 1.6. Comply with ***relevant legislative and regulatory requirements*** applicable to international education events and programs

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ELEMENT	PERFORMANCE CRITERIA
2. Assist in preparing for international education events and programs	2.1. Collate and package appropriate ***information*** according to the event or program plan 2.2. Check stocks of material for quality and sufficiency, and confirm storage and distribution details 2.3. Report identified shortfalls in material and order, in line with organisational procedures 2.4. Prepare relevant material as needed 2.5. Make arrangements with ***relevant clients and other stakeholders*** according to the requirements of the event, program and organisational procedures 2.6. Assist in identifying and arranging supply of required facilities, equipment and material for events and programs 2.7. Assist with booking and confirming domestic and international travel, accommodation and venues as required by particular event or program
3. Make information presentations in relation to international education events and programs	3.1. Prepare to deliver information ***presentations*** for specific events and programs, relevant to work role 3.2. Deliver information presentations as required and approved, in line with organisational policy and procedures 3.3. Make improvements to presentations based on feedback from ***relevant personnel***
4. Contribute to international education events and programs	4.1. Check and arrange delivery of required material and equipment to specified client or other stakeholder destinations on time and in line with organisational policy and procedures 4.2. Facilitate meeting relevant legislative and regulatory requirements in relation to the distribution of goods and material 4.3. Monitor communication and process flow to ensure on-time despatch of requested material and resources for events and programs to specified persons and destinations 4.4. Provide assistance to event or session presenters to facilitate smooth presentations 4.5. Provide assistance and support to clients and stakeholders, as needed, during events and programs 4.6. Seek advice from relevant personnel if situations or issues arise that require departure from regular practices
5. Contribute to the	5.1. Follow organisational policies and procedures for

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ELEMENT	PERFORMANCE CRITERIA
continuous improvement processes for international education events and programs	facilitating events and programs, in accordance with work role activities 5.2. Apply cross-cultural communication skills and strategies in events and programs 5.3. Perform work effectively within a team environment to assist facilitation of events and programs 5.4. Assist in determining client satisfaction regarding event and program outcomes 5.5. Use feedback from stakeholders to promote continuous improvement in own work 5.6. Provide input to organisational policy and procedures review and development regarding facilitation of events and programs

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to interact effectively in an intercultural context with clients, co-workers and other stakeholders in relation to events and programs; to make information presentations at events
- initiative and enterprise skills to suggest improvements to event and planning processes
- learning skills to improve own work performance and to adjust work practices to the satisfaction of the organisation
- planning and organising skills to assist with event or program activities in accordance with job role
- problem-solving skills to deal with changes and contingencies which may arise before or during events and programs
- numeracy skills to organise supply of adequate resources for event
- self-management skills to work independently on allotted event-related tasks
- technology skills to use a computer and other office equipment to carry out allotted tasks in relation to event or program.

Required knowledge

- communication networks, lines and strategies
- coordinator and team roles for planning and facilitating events and programs

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REQUIRED SKILLS AND KNOWLEDGE
• information presentation strategies • information provision and distribution strategies • internal and external clients, presenters and support people involved in managing and participating in events and programs • relevant legislative and regulatory compliance issues in relation to facilitating international education events and programs • relevant organisational policy and procedures • resource requirements for international education events and programs • stakeholders in international education events and programs • team behaviour and participation • travel and accommodation requirements for international education events and programs coordination • types, purposes and formats of international education events and programs.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • applying cross-cultural communication strategies in relation to international education events and programs • assisting with planning and facilitating international education events and programs • knowledge of relevant legislative and regulatory compliance issues.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of

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EVIDENCE GUIDE	
	portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports • analysis of projects, case studies, completed records and reports developed by the candidate • review of documentation recording requirements for information, material and services during the planning stages • oral or written questioning to assess knowledge of travel and accommodation requirements for event and program coordination • evaluation of using feedback from stakeholders to promote continuous improvement in own work • observation of delivery of information presentations.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units • customer service units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Events and programs may include:	• briefings and social activities for student pre-departure • careers fairs, events and exhibitions • cultural festivals and religious celebrations such as Chinese New Year, Diwali • functions for welcoming agents and clients to the country • graduation and alumni events, dinners, award ceremonies • internal open days and information days • memorial services

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RANGE STATEMENT	
	• multicultural days and activities • orientation sessions • overseas exhibitions and agent briefings • professional development orientation sessions, workshops, seminars, conferences • professional network events • recreational, social and educational activities • religious observances • social events connected to specific groups such as postgraduate dinners • trips and tours • various forums for disseminating information • visits to other international education provider's open days and information days
Organisational policy and procedures may include:	• documented procedures for facilitating events and programs • international student-specific documented policies and procedures

Relevant legislative and regulatory requirements may include:	• contracts and agreements with agents
	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:
	  • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance
	  • business compliance relevant to work roles
	  • Education Services for Overseas Students (ESOS) Act 2000, and subsequent amendments and related legislation
	  • contracts and agreements with agents
	  • employment, education and training - relevant to onshore and offshore provision
	  • environmental issues
	  • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade

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RANGE STATEMENT	
	(DFAT) • National Code of Practice for Registration Authorities and Providers of International Education and Training • occupational health and safety (OHS) • privacy and confidentiality • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices
Information may include:	• information for students, staff, agents, presenters, support persons and other stakeholders covering: • contact lists and details of students, personnel, participants • organisational, educational, social, tourist and environmental information • program activities • programs, timetables, schedules and details for event presentations and delivery • relevant legislative, regulatory, standards information, including for OHS and security • travel information and advisories • information specific to agents and other clients: • course and campus information • educational standards and qualifications • English language requirements for prospective applicants • fees, refunds and grievance procedures • government guidelines and regulations relating to the ESOS Act • marketing and recruitment information • partner institution information • student services information • study tour schedules and agreements • travel schedules • updated agreements and renewals of contracts • information specific to conference, seminar or workshop facilitators, presenters, attendees and

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RANGE STATEMENT	
	support personnel including: • available resources • contacts • event and program details including times, dates and venue • papers and presentation or facilitation requirements
Relevant clients and other stakeholders may include:	• internal clients such as section, department or faculty staff • international students • other clients of the organisation such as parents of students, homestay providers, consular staff, overseas agents, government and private organisations, departments and agencies, other educational organisation
Presentations may include:	• audio or video taped presentations • face-to-face delivery • information reports at team meetings • OHS workplace requirements • orientation information • presentation software or other presentation materials and electronic equipment • program information
Relevant personnel may include:	• audience of presentation • coordinators, managers • team members • other stakeholders involved with facilitating event and program activities

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

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Co-requisite units

Co-requisite units		

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BSBEDU401A Coordinate provision of pastoral care services to international students

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to coordinate provision of quality services and support required by international students enrolled in an Australian education institution. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals coordinating the provision of pastoral care in a variety of international education contexts. They will be carrying out administration work using well developed skills and drawing from a broad knowledge base in one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Coordinate information on international students' pastoral care needs	1.1. Report relevant information regarding potential and actual pastoral care requirements of ***student groups and individuals***
	1.2. Establish and promote organisational risk management strategies in relation to provision of pastoral care services
	1.3. Administer and report on results of organisational surveys and assessments of international student expectations and needs
	1.4. Ensure information is in line with ***relevant legislation***, ***regulations and codes***
2. Provide effective advisory services to students	2.1. Monitor own communication skills to ensure effectiveness of pastoral care advice for students from diverse cultural backgrounds
	2.2. Coordinate work roles and responsibilities, and identify and assess resources for advising students
	2.3. Consult relevant personnel in ***pastoral care specialisations*** to identify roles and services
	2.4. Formulate support programs and services to meet international student needs
	2.5. Manage grievance processes using organisational

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ELEMENT	PERFORMANCE CRITERIA
	policy and procedures 2.6. Manage student information and records, for compliance with privacy and confidentiality standards 2.7. Schedule consultation and debriefing for and with, work colleagues
3. Ensure compliance with legislation, regulations, codes and organisational policies	3.1. Select and record information about relevant legislation, regulations and codes in relation to provision of pastoral care services 3.2. Select and record information about organisational policy and practices relating to provision of pastoral care services 3.3. Communicate information in relation to compliance with relevant legislation, regulations, codes and organisational policies and procedures, to clients and stakeholders 3.4. Monitor and report on implementation of policy and processes in relation to provision of pastoral care for students, to ensure compliance 3.5. Monitor compliance with ***standards*** applicable to the provision of pastoral care services 3.6. Recommend adjustments to organisational policies and procedures to appropriate organisational personnel
4. Manage information and resources relating to provision of pastoral care	4.1. Review information about and access to, international student support and pastoral care services 4.2. Consult appropriate ***pastoral care services external to the organisation*** 4.3. Manage resources for information to international students and other stakeholders 4.4. Make adjustments to formats and access to information, according to compliance and organisational requirements 4.5. Implement and review improvements to communication systems
5. Coordinate quality assurance processes for provision of pastoral care	5.1. Review trends in the provision and uptake of pastoral care services 5.2. Establish quality indicators and strategies for developing appropriate organisational ***student support programs*** 5.3. Conduct comparative reviews of student support

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ELEMENT	PERFORMANCE CRITERIA
	programs across a range of organisations 5.4. Implement and promote improvements in student support and pastoral care provision 5.5. Survey student satisfaction with pastoral care services and report to appropriate organisational personnel

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to interact effectively in an intercultural context with clients, co-workers and stakeholders; to handle sensitive matters; to effectively gather, convey, receive and act on information; to use effective questioning and active listening techniques; to apply appropriate cross-cultural communication techniques, to overcome communication barriers, and to give and receive feedback
- initiative and enterprise skills to access and consult relevant people, and to manage compliance and risks associated with pastoral care provision
- learning skills to access and understand requirements of relevant legislation and regulations, particularly the Education Services for Overseas Students (ESOS) Act 2000 and subsequent amendments, and related legislation; Department of Immigration and Citizenship (DIAC) guidelines for international students under 18 years of age; child protection; occupational health and safety; and privacy and confidentiality
- literacy skills to gather and record information relevant to provision of pastoral care services; to interact with others and report on compliance and outcomes planning and organising skills to maintain an accessible contact list
- problem-solving skills to resolve issues and conflict, and to negotiate outcomes
- self-management skills to provide adequate and accurate information to students, and to plan and support provision of pastoral care services
- technology skills to use a computer and other office equipment to access, record and retrieve information relevant to pastoral care and related student services.

Required knowledge

- aspects of pastoral care offered in a range of settings
- cross-cultural communication principles and protocols
- impact and influence of cultural difference on provision of pastoral care services
- international education workplace environment

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REQUIRED SKILLS AND KNOWLEDGE

• legislative and regulatory requirements governing overseas students studying in Australia under the auspices of an Australian organisation
• limitation of responsibility and own role parameters in coordinating pastoral care provision in relation to the roles of pastoral care specialisations both within and external to the organisation
• organisational policies and procedures
• own work role and team's work role
• position and work roles of organisational personnel
• requirements of education and training legislation
• student support services and systems such as learning support and counselling services
• types of issues that could concern international students such as:
  • student wellbeing and welfare such as cultural adjustment, cross-cultural communications and expectations, illnesses, accidents, mental health problems, accommodation, financial matters, loneliness and isolation
  • course-related issues such as student progress, access to services, English language and other support
  • grievances and concerns such as assessment and marking concerns, bullying or intimidation, crimes, property and personal security issues
  • compliance related issues such as non-attendance or insufficient attendance, visa non-compliance, interruption of studies
  • staffing related issues such as professional limitation of staff responsibility and parameters of roles, staff performance, student/teacher workplace behaviour expectations, differentiation among staff roles and managing staff workloads, time and resources.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • applying and monitoring cross-cultural communication in the provision of pastoral care services in an international education context • providing relevant information and quality advice

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EVIDENCE GUIDE	
	about the provision of pastoral care services in relation to international education at the appropriate work role level • coordinating, reviewing and improving the provision of pastoral care services in line with organisational policies, legislative and regulatory requirements • knowledge of legislative and regulatory requirements governing overseas students studying in Australia.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports • analysis of projects, case studies, completed records and reports developed by the candidate • review of organisational risk management strategies established and promoted in relation to the provision of pastoral care services • oral or written questioning to assess knowledge of impact and influence of cultural difference on the provision of pastoral care services • evaluation of communication of compliance information in relation to clients and stakeholders • review of reporting on student satisfaction survey with pastoral care services • analysis of documentation reviewing trends in the provision and uptake of pastoral care services.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units • customer service units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Student groups and individuals may include:	• international students in:
	  • English Language Intensive Courses for Overseas Students (ELICOS) centres
	  • institutes and private colleges
	  • pre-university and bridging programs
	  • primary and secondary schools
	  • universities
	• nationally based groups or other international student support organisations and groups
	• students who could have specific support needs:
	  • first year students
	  • groups defined by religious or cultural background
	  • postgraduate students
	  • students identified as being at risk
	  • students under 18 years of age
	  • students with dependents

Relevant legislation, ***regulations and codes*** may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:
	  • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance
	  • business compliance relevant to work roles
	  • child protection legislation and regulations
	  • ESOS Act, subsequent amendments and related legislation
	  • employment, education and training - relevant to onshore and offshore provision
	  • environmental issues
	  • ESOS Assurance Fund requirements

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RANGE STATEMENT	
	• immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT) • National Code of Practice for Registration Authorities and Providers of International Education and Training • occupational health and safety • privacy and confidentiality • relevant state/territory tenancy Acts • relevant state/territory education legislation and regulations relating to overseas student accommodation for under 18 year olds • Transnational Quality Strategy (2005) • workplace employment practices and industrial relations • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices
Pastoral care specialisations may include:	• academic course advice • accommodation advice and information, including homestay programs • careers counselling • chaplaincy services • disability services • financial advice • international student advice • language and learning support • medical and health services • residential advisory services • student counselling
Standards applicable to the delivery of pastoral care services may include:	• Australia Quality Training Framework (AQTF) Standards for Registered Training Organisations, the nationally agreed standards for vocational training and education - includes coverage of delivery and assessment, client

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RANGE STATEMENT	
	services requirements and records • National ELT Accreditation Scheme (NEAS) standards for young learners and for teaching English language to international students
Pastoral care services external to the organisation may include:	• community support services such as interpreters • ethnic support groups • gambling and drug-related support services • mental illness services • religious groups • telephone counselling emergency and crisis support services
Student support programs may include:	• community links programs • crime awareness and prevention programs • cultural support programs • first year support programs • homestay programs • orientation programs • peer support and mentoring programs • postgraduate programs • pre-departure programs • returning home programs • spouse and dependent support programs

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

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Co-requisite units

Co-requisite units		

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BSBEDU501A Facilitate international education compliance

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to facilitate legislative and regulatory compliance governing the operations of an international education organisation. This involves managing the review, development and implementation of compliance related policies and procedures. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals facilitating compliance within an international education provider context. They could work in the administration of education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Implement organisational policies and procedures to facilitate compliance with legislation and regulations	1.1. Identify and correctly interpret ***legislative and regulatory requirements*** applicable to an international education organisation 1.2. Plan for and develop strategies to effectively manage legislative and regulatory compliance 1.3. Identify and apply ***organisational policies and procedures*** and systems to manage compliance 1.4. Communicate organisational policies and procedures, and legislative and regulatory requirements to ***relevant organisational staff***, ***international clients and stakeholders*** 1.5. Gather and evaluate required information from internal and external sources, to ensure compliance with relevant legislative and regulatory requirements 1.6. Consult with relevant organisational staff to ensure compliance policies and procedures are circulated,

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ELEMENT	PERFORMANCE CRITERIA
	understood and applied
2. Communicate with relevant stakeholders and bodies in relation to compliance with legislation and regulations	2.1. Communicate organisational ***monitoring*** and ***reporting*** processes across the organisation 2.2. Identify and apply effective communication strategies to facilitate implementation of processes 2.3. Agree on effective internal operational procedures for administering ***insurance and finance requirements*** 2.4. Consult ***external bodies*** in relation to issues arising from compliance with legislative and regulatory requirements
3. Ensure organisation's monitoring and reporting systems are applied	3.1. Record and report student monitoring and reporting information and statistics 3.2. Conduct regular evaluation of student monitoring and reporting systems 3.3. Consult with staff using monitoring and reporting systems to exchange information and to identify non-compliance 3.4. Document legislative and regulatory non-compliance, follow-up corrective action reports and regularly review organisational processes 3.5. Monitor and evaluate effectiveness of corrective action and report improvement suggestions in line with organisational policies and procedures
4. Resolve issues relating to compliance	4.1. Establish ***case management procedures*** for resolution of issues, observing protocols for client advocacy, privacy and confidentiality 4.2. Implement communication strategies for interaction with government agencies and other ***external bodies*** 4.3. Generate reports on progress of case management and other issues, and present to decision makers 4.4. Identify organisational policy and procedures improvement/s to ensure resolution of issues

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE

Required skills

- communication skills to interact effectively in an intercultural context with clients, co-workers and other stakeholders; to consult and negotiate to solve problems and to resolve conflict
- initiative and enterprise skills to investigate compliance issues and to ensure referrals to relevant people and agencies
- learning skills to monitor trends in compliance requirements
- literacy skills to prepare reports for management team and key stakeholders
- numeracy skills to analyse trends in visa compliance and cancellations
- planning and organising skills to maintain relevant compliance records
- problem-solving skills to address improvement of compliance
- teamwork skills to work effectively with a range of people performing various roles
- technology skills to use a computer and other office equipment to access information, to produce documents and to communicate in an international education compliance context; to use the Provider Registration and International Student Management System (PRISMS) database.

Required knowledge

- applicable aspects of the current Australian Quality Training Framework (AQTF) Standards for Registered Training Organisations
- compliance requirements for international education services as they relate to a frontline management work role and:
  - organisational leadership and strategic management
  - policy and procedures development and implementation
  - management of international education-related information and communications, operations and records
- government agencies and their roles in Education Services for Overseas Students (ESOS) Act 2000 compliance related matters including Department of Immigration and Citizenship (DIAC) requirements
- monitoring and reporting processes mechanisms and requirements via PRISMS
- organisational processes and policies in relation to monitoring and reporting international student progress
- range of potential issues in relation to student visa compliance, and trends in student visa compliance and cancellations
- requirements for education providers under the ESOS Act, any subsequent amendments and regulations, and the Australian National Code
- staff roles in monitoring and reporting compliance in international education.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • maintaining current and accessible organisational information about legislative and regulatory compliance requirements • communicating effectively and accurately with diverse groups and individuals in relation to international education-related legislative and regulatory compliance requirements • knowledge of compliance requirements for international education services.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports • analysis of projects, case studies, completed records and reports developed by the candidate • review of strategies developed to effectively manage legislative and regulatory compliance • oral or written questioning to assess knowledge of staff roles in monitoring and reporting compliance in international education • review of documentation communicating organisational monitoring and reporting processes across the organisation • review of evaluation of student monitoring and reporting systems • evaluation of case management procedures

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EVIDENCE GUIDE	
	established for resolution of issues.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units • customer service units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legislative and regulatory requirements may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to: • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance • business compliance relevant to work roles • ESOS Act, subsequent amendments and related legislation • employment, education and training - relevant to onshore and offshore provision • environmental issues • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT) • National Code of Practice for Registration Authorities and Providers of International

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RANGE STATEMENT	
	Education and Training • occupational health and safety • privacy and confidentiality • Transnational Quality Strategy (2005) • workplace employment practices and industrial relations • National ELT Accreditation Scheme (NEAS) standards for young learners and for teaching English language to international students • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices
Organisational policies and procedures may include:	• international student-specific documented policies and procedures • other organisational documented procedures, for example for facilitating events and program activities, for resolving grievances, for managing human and other resources
Relevant organisational staff may include:	• academic staff • admissions officers • faculty managers • international education-specific and general staff • international student advisers • marketing officers • recruitment officers • regional managers
International clients and stakeholders may include:	• accommodation and homestay providers • dependents of international students • international students • parents and significant others of international students • recruitment agents
Monitoring may include:	• accessing student progress data • recording student attendance • liaising with institutional staff to determine student progress • meeting students on an individual basis to communicate legislative obligations • monitoring ESOS Assurance Fund compliance

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RANGE STATEMENT	
	• monitoring processes under Section 5 of the ESOS Act • monitoring processes under the AQTF Standards for Registered Training Organisations (RTOs), where applicable • representing students, if necessary, on progress committees • reviewing student progress
Reporting may include:	• informing DIAC of student visa breaches through PRISMS • processes to comply with registration requirements for RTOs, where applicable • processes to comply with the organisation's Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) registration • using online systems such as PRISMS and student database systems
Insurance and finance requirements may include:	• Australian Student Tuition Assurance Scheme • overseas student health cover arrangements • refund processes under legislative requirements and institutional policies • student fees administration
External bodies may include:	• DEST staff • DIAC staff • education and training accreditation and registration authorities • families of international students • overseas student health cover providers • recruitment agents • staff in other educational institutions
Case management procedures may include:	• coordinating individual or group discussion to resolve student issues • processes to assist a student to access internal or external support • referring students to individuals with specialised roles and expertise to resolve issues

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU502A Manage international education issues and incidents

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to implement policies and procedures for resolving issues and managing incidents that could arise in the international education environment with particular emphasis on compliance, risk management and continuous improvement. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are required to manage resolution of issues and critical incidents that could occur in an international education provider context. They could work in the administration of education programs and projects in organisations from one or more international education sectors of (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Implement policies and procedures for managing issues and incidents	1.1. Distinguish between ***day-to-day issues and incidents*** and the more ***serious issues and critical incidents*** that could occur in an international education organisation 1.2. Categorise possible organisational responses to the range of potential issues and incidents 1.3. Research and analyse issues and incidents data in an international education services context, and propose mechanisms for gathering reliable data on issues and incidents 1.4. Assess research data on issues and incidents to identify and evaluate organisational responses 1.5. Establish and implement ***organisational policies and procedures*** for managing the resolution of a

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ELEMENT	PERFORMANCE CRITERIA
	range of potential issues and incidents 1.6. Undertake consultation periodically with ***relevant stakeholders*** regarding continued relevance of organisational policies and procedures that relate to issues and incidents
2. Communicate policies and procedures in relation to issues and incidents resolution	2.1. Identify relevant stakeholders and communicate organisational policies and procedures in relation to the treatment and resolution of issues and incidents 2.2. Seek feedback from relevant stakeholders on communicated policies and processes, and identify required action as appropriate 2.3. Communicate ***legislative and regulatory compliance requirements*** and any subsequent changes or amendments to relevant staff 2.4. Provide appropriate information and support to staff who have responsibility for issues and incidents resolution 2.5. Ensure debriefing opportunities by qualified personnel are available for those involved in any serious issue or critical incident
3. Facilitate and review compliance with organisational policies and procedures for dealing with and managing issues and incidents	3.1. Establish procedures to ensure compliance with organisational policies and procedures in relation to issues and incidents across organisation's operations 3.2. Establish processes and procedures for meeting legislative and regulatory compliance requirements in managing, issues and incidents resolution 3.3. Apply ***risk management processes and strategies*** to compliance requirements for dealing with and managing, issues and incidents resolution 3.4. Review and adjust compliance procedures on a regular basis, according to organisational policies and procedures for dealing with and managing, issues and incidents resolution
4. Resolve issues and incidents	4.1. Facilitate timely and appropriate response to issues and incidents in line with the seriousness of the issue or incident and with organisational policies and procedures 4.2. Use established reporting lines of communication in relation to issues and incident, and associated information requirements 4.3. Update records, files and other information sources in line with organisational policies and procedures

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ELEMENT	PERFORMANCE CRITERIA
	regarding issues and incidents 4.4. Generate and present reports to decision makers on progress and outcomes of responses to issues and incidents 4.5. Follow-up with relevant personnel to ensure progress of resolution of issues or incidents 4.6. Ensure outcomes are agreed and signed off by personnel involved with issues and incidents resolution management, and any other parties to the resolution, in line with organisational requirements 4.7. Identify, document and implement required organisational policies and procedures improvement changes once issue or incident has been resolved

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to interact effectively in an intercultural context with clients, co-workers and stakeholders dealing with issues and incidents relevant to work role; to communicate policies and procedures within a team; to apply conflict resolution skills, including negotiation in issues resolution; to interact appropriately with the variety of people who may be involved; to record key facts and related information during resolutions of issues and incidents; to participate in staff debriefing processes
- initiative and enterprise skills to arrange staff schedules and activities
- literacy skills to accurately report, record and present research information and information about issues and incidents
- management skills to manage information and communication processes; to lead and manage others in resolving issues and incidents; to ensure correct implementation of policies and procedures; to identify and manage risks; to manage for quality including reviewing and adjusting policies
- planning and organising skills to maintain relevant records, particularly files dealing with issues and incidents; to ensure availability of adequate resources; to refer to appropriate people or agencies
- problem-solving skills to investigate and resolve problems which could arise in providing information to stakeholders; to assist others to resolve issues
- research skills to conduct information research; to source, collect, analyse and

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REQUIRED SKILLS AND KNOWLEDGE
evaluate data • self-management skills to remain calm and controlled under pressure, to set and maintain boundaries, and to prioritise own activities • technology skills to use technology appropriate to an issue and incident resolution context, such as communication technologies.
Required knowledge

• relevant legislative and regulatory requirements
• organisational development and behaviour, and human behaviour and responses to issues and incidents
• organisational structure and relationship of functions in an international education organisation
• principles and practices of quality management as they relate to managing issues and incidents in an international education organisation including:
  • continuous improvement
  • client service, leadership and strategic management
  • policies and procedures development and implementation
  • information and communication provision
  • management of operations, resources, people and records
  • risk identification and management
• recognising own roles and responsibilities in the following types of incidents:
  • reporting crime, injury, serious or contagious illness or death
  • delivering sensitive information
  • dealing with academic difficulties or failure, breaches of confidentiality, unexplained absence of students, harassment, threats to personal safety and health problems
• types of issues that could occur in an international education organisation including:
  • student wellbeing and welfare such as cultural adjustment, cross-cultural communications and expectations, illnesses, accidents, mental health problems, accommodation, financial matters, loneliness and isolation
  • course-related issues such as student progress, access to services, English language and other support
  • grievances and concerns such as assessment and marking concerns, bullying or intimidation, crimes, property and personal security issues
  • compliance related issues such as non-attendance or insufficient attendance, visa non-compliance, interruption of studies
  • staffing related issues such as professional limitation of staff responsibility and parameters of roles, staff performance, student/teacher workplace behaviour expectations, differentiation among staff roles and managing staff workloads, time and resources.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • establishing, implementing and improving policies and procedures to manage the range of possible issues and incidents in an international education organisation • resolving issues and incidents using appropriate cross-cultural and other communication strategies, negotiation and communication skills, and undertaking appropriate consultation and reporting • knowledge of relevant legislative and regulatory requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports on how the candidate manages issues and critical incident resolution • analysis of projects, case studies, completed records and reports developed by the candidate • review of communication of organisational policies and procedures for managing the resolution of a range of potential issues and incidents • oral or written questioning to assess knowledge of risk identification and management • review of information provided to staff who have

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EVIDENCE GUIDE	
	responsibility for issues and incidents resolution • observation of presentation of reports to decision makers on progress and outcomes of responses to issues and incidents.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Day-to-day issues may include:	• academic or educational progress • accommodation and welfare • cultural adjustment • illness • non-compliance situations • student finances • training and assessment • work role
Day-to-day incidents may include:	• conflict • harassment (for example, racial or sexual) • need to deliver sensitive information • non-compliance situations • theft • unexplained student absence
Serious issues may include:	• academic failure • accommodation including conflict and lack of accommodation • health issues including mental or physical illness • need to deliver serious and sensitive

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RANGE STATEMENT	
	information, for example relating to family • non-compliance • unresolved or critical grievance
Critical incidents may include:	• accidents • critical, serious or contagious illness • death • disappearance of students • incidents involving mental health problems • serious crime affecting clients or co-workers
Organisational policies and procedures may include:	• international student-specific documented policies and procedures in relation to dealing with issues and incidents • other organisational documented procedures, for example for resolving grievances, for communicating with clients, for managing human and other resources
Organisational policies and procedures for managing the resolution of a range of potential issues and incidents must include:	• communication channels • reporting lines
Relevant stakeholders may include:	• agents • consular staff • government or agency personnel • homestay providers • organisation personnel • parents • students

Legislative and regulatory compliance requirements may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:
	  • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance
	  • business compliance relevant to work roles
	  • child protection
	  • ESOS Act, subsequent amendments and related legislation
	  • employment, education and training - relevant to onshore and offshore provision

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RANGE STATEMENT	
	• environmental issues • ESOS Assurance Fund requirements • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT) • National Code of Practice for Registration Authorities and Providers of International Education and Training • OHS • privacy and confidentiality • Transnational Quality Strategy (2005) • workplace employment practices and industrial relations • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices
Risk management processes and strategies may include:	• risk management and control measures could include: • coaching and training staff • communicating legislative and regulatory requirements • developing compliance strategies • undertaking a structured process that identifies possible risks, assesses the likelihood and consequences of risks, and identifies effective control measures

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU503A Manage international student recruitment and selection

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage the recruitment and selection of international students for an international education organisation, including marketing the organisation's services and reviewing and improving marketing and selection activities. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with recruitment and selection roles in an international education provider context. They could work in the administration of education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Manage schedules for marketing and recruiting international students	1.1. Consult with individuals, groups and agencies in planning ***recruitment activities and events*** 1.2. Develop schedules for recruitment activities and events 1.3. Develop and manage resources and information for recruitment activities and events 1.4. Disseminate collated information to relevant colleagues in work unit and organisation
2. Establish and apply procedures for assessing applications from prospective international students	2.1. Establish and manage ***procedures for assessing applications*** from prospective international students 2.2. Record, securely store and regularly update information relating to applications from prospective international students, in line with organisational policies and procedures

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Develop systems for maintaining contact details of ***relevant individuals***, ***groups and agencies*** to ensure ease of access 2.4. Collate, manage and use information relating to comparative educational systems and processes
3. Establish and maintain agent and client networks for use in international student recruitment	3.1. Locate ***international education recruitment agents and clients*** using and applying ***information from a range of sources*** 3.2. Evaluate and validate professional credentials for international education recruitment agents and clients 3.3. Identify appropriate communication protocols and strategies and apply in interactions with international education recruitment agents and clients 3.4. Develop, manage and review agreements and contracts for international education recruitment agents and clients on a regular basis 3.5. Communicate protocols for communication and agreements with international education recruitment agents and clients to ***relevant personnel***
4. Develop international student recruitment and selection plans and strategies	4.1. Develop and review recruitment and selection budgets, in line with organisational policies and procedures 4.2. Organise recruitment activities and events, and apply forward planning strategies 4.3. Apply appropriate communication strategies in providing information to clients and colleagues 4.4. Assess written material for compliance with ***legislative and regulatory requirements*** and make required adjustments 4.5. Assess effectiveness of recruitment and selection activities against targets and make required adjustments to plans 4.6. Provide reports on recruitment and selection processes, activities and outcomes to ***relevant personnel***
5. Manage quality of international student recruitment and selection services	5.1. Identify and follow relevant codes of practice in recruitment and selection of international students, and in conducting associated marketing activities 5.2. Manage organisational policies and procedures for assessment of overseas qualifications and credentials 5.3. Follow procedures for monitoring validity and authenticity of prospective international student entry

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ELEMENT	PERFORMANCE CRITERIA
	requirement documentation 5.4. Regularly review recruitment and selection services provided by work unit and make adjustments to meet client expectations 5.5. Maintain accurate and complete ***records*** 5.6. Apply risk management strategies for recruitment and selection of international students 5.7. Manage work unit briefings and ***professional development*** for recruitment and selection of international students

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to interact effectively in an intercultural context with clients, co-workers, education agents and other stakeholders involved in student selection; to develop communications with clients and agents from a range of countries and cultural backgrounds; to effectively gather, convey, receive and act on information and advice; to handle sensitive issues and matter
- initiative and enterprise skills to contribute to marketing activities including managing the cost effectiveness of marketing strategies
- literacy skills to identify, record and process information from a range of sources and to integrate informationinto reports and presentations
- management skills to manage:
  - compliance within relevant legislative and regulatory frameworks
  - contracts
  - events and activities in a culturally diverse environment
  - international student recruitment and selection processes
  - quality particularly in planning, reviewing and reporting on marketing, recruitment and selection processes
- planning and organising skills to source and select information relevant to the task
- self-management skills to manage own work and the work of others
- teamwork to lead and participate in teams
- technology skills to use the internet to research information.

Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE
• assessment and application procedures for relevant education and training qualifications • English language requirements and competencies for international student entry • examples of best practice from a range of sources • international student issues such as adjustment and transition processes of students, and available internal and external student services and systems • marketing protocols and codes of practice • online sources of information, and country and cultural information • principles applying to the development and production of marketing and recruitment materials • relevant international and domestic educational systems, processes and qualifications • relevant legislation, regulations and codes of practice particularly those pertaining to trade practices, contracts and consumer protection • requirements for education providers under the Education Services for Overseas Students (ESOS) Act 2000 and any subsequent amendments and regulations, and the Australian National Code • roles and responsibilities of designated work roles in international education • sources of professional development opportunities • trends in international education including student experience and outcomes, statistics and analysis.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • implementing and managing compliant marketing, recruitment and selection policies and procedures • managing marketing, recruitment and selection activities, records and associated agreements and contracts in relation to prospective international students • knowledge of relevant legislation, regulations and codes of practice.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports on how the candidate manages international student recruitment and selection processes • observation of demonstration of techniques in developing resources and information for recruitment activities and events • analysis of projects, case studies, completed records and reports developed by the candidate • review of procedures established for assessing applications from prospective international students • review of schedules developed for recruitment activities and events • analysis of recruitment and selection budgets • oral or written questioning to assess knowledge of principles applying to the development and production of marketing and recruitment materials.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and

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RANGE STATEMENT	
regional contexts) may also be included.	
Recruitment activities and events may include:	• dissemination of materials in formats including websites and brochures • exhibitions • hosting clients and agents • informal and formal meetings with recruitment agents and clients • information sessions with recruitment agents • interviews with prospective international students and/or their families • overseas or domestic events related to marketing of institutions and courses
Procedures for assessing applications may include:	• accessing current information and advisories relating to documentation and educational qualifications • assigning roles and responsibilities • maintaining databases about overseas credentials and educational systems • procedures for monitoring validity and authenticity of application and entry documentation • referring to existing standards of overseas qualifications and acceptance in Australian institutions
Relevant individuals, ***groups and agencies*** may include:	• alumni organisations and student organisations • Australian diplomatic staff • clients • colleagues • consulates and delegations • Department of Education, Science and Training (DEST) • Department of Immigration and Citizenship (DIAC) • faculty management staff • international education agencies such as IDP Education Australia • international education office staff • international student support staff • professional associations • recruitment agents • state/territory and commonwealth government

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RANGE STATEMENT	
	international education departments and divisions • state/territory education departments and training authorities • supervising officers
International education recruitment agents and clients may include:	• agents recruiting overseas students • international education counsellors and advisors • overseas companies • overseas government agencies • personnel at overseas educational organisations
Information from a range of sources may include:	• academic research relating to international education • Australian National Code of Practice for Registration Authorities and Providers of Education and Training to Overseas Students • cultural information describing educational practice in source countries • ESOS Act • examples of programs and activities to support international students • information describing cultural practices in source countries • market intelligence for source countries • organisational policies and procedures • overseas student health cover information • records of work practice in own and other organisations • statistics and reports relating to international education
Relevant personnel may include:	• board or committee of management • chief executive officer • institute council • senior level managers • team and managers
Legislative and regulatory requirements may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to: • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial

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RANGE STATEMENT	
	intolerance • business compliance relevant to work roles • child protection legislation and regulations • employment, education and training - relevant to onshore and offshore provision • environmental issues • ESOS Act, subsequent amendments and related legislation • ESOS Assurance Fund requirements • immigration related policies and procedures for example from commonwealth government departments such as DEST, DIAC, Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT) • National Code of Practice for Registration Authorities and Providers of International Education and Training • occupational health and safety • privacy and confidentiality • Transnational Quality Strategy (2005) • workplace employment practices and industrial relations • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices
Records may include:	• information relating to comparative education systems • internal organisational documents • marketing information • online databases • records of discussions with colleagues and prospective international students • reports, publications, conference papers, training sessions attended or presented • strategic planning documents • student records including records required under legislation and regulations
Professional development may include:	• conferences • lectures

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RANGE STATEMENT	
	• mentoring activities • seminars • staff exchanges • workshops

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU504A Manage international education and training processes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage educational and training processes and performance in an international education organisation in relation to compliance with legislation, regulations and standards. It covers managing information provision, resources and records to support delivery of education and training programs in one or more educational sectors. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals managing international education and training processes and performance. They will be working in the administration of education programs and projects in one or more international education sectors (schools, vocational education and training, English language training organisations, vocational training and education, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Facilitate compliance with legislative and regulatory requirements	1.1. Manage compliance with ***legislative and regulatory requirements*** in relation to application and enrolment processes for international students 1.2. Manage compliance with legislative and regulatory requirements and ***standards*** that apply to the provision of international education and training 1.3. Review and develop organisational policies and procedures for education and training processes and delivery with reference to relevant legislative and regulatory requirements, codes and standards 1.4. Identify risk factors and controls, and manage risk in delivery of organisation's education and training programs
2. Manage provision of	2.1. Manage information provision in relation to

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ELEMENT	PERFORMANCE CRITERIA
education and training information and services for international students	education and training courses and services, and address consequent information needs of international students 2.2. Manage processes for updating education and training information through the organisation's processes 2.3. Manage strategies to ensure the adequacy and effectiveness of international student study support through organisation's processes
3. Manage provision of and access to education and training resources for international students	3.1. Monitor provision of student facilities to ensure they are in accordance with relevant standards 3.2. Monitor use of organisation's facilities that support learning and assessment in relation to their efficiency, availability, economy and maintenance 3.3. Manage and monitor provision of equipment, materials, learning and assessment ***resources*** for students in conjunction with ***relevant personnel*** to ensure currency, relevance and adequacy of resources and compliance with organisational policies and relevant standards 3.4. Develop forward estimates in relation to financing education and training programs, within work role parameters 3.5. Monitor, review and adjust budgets to ensure economic viability of education and training program delivery, within work role parameters 3.6. Disperse financial allocations in accordance with organisational policies, and rationalise and account for procedures and expenditure, within work role parameters
4. Review and develop teaching and training practices for international students	4.1. Review teaching and training practices in accordance with organisational policies and procedures 4.2. Assess periodically, the outcomes of teaching and training practices and evaluate against organisational client services objectives 4.3. Support consultation with staff and students regarding individual progress, and identify and address emerging needs 4.4. Review administrative support for organisation's education and training programs, and recommend improvements to higher level management 4.5. Monitor resourcing of education, training and

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ELEMENT	PERFORMANCE CRITERIA
	administration functions to facilitate best practice outcomes from organisation's education and training programs 4.6. Identify staff professional development needs against organisation's skill set to meet organisational education and training objectives 4.7. Undertake mentoring to guide and support staff, and to encourage and facilitate professional development or training
5. Review and manage education and training record keeping for international students	5.1. Establish or develop a compliant record management system for completion and storage of education and training records, and review to ensure its efficiency and compliance 5.2. Facilitate compliance in relation to developing and implementing ***student learning and assessment requirements*** 5.3. Monitor ***awards*** documentation and registers for accuracy and compliance with organisational policies and standards 5.4. Manage staff and student information and records for compliance with privacy and confidentiality, legislation and standards 5.5. Monitor administrator scheduling of learning and assessment related activities, including accurate and timely communication of schedules and changes 5.6. Monitor student fees processes to facilitate compliance with standards 5.7. Record, report and rectify non-compliance in relation to documents and records according to organisational policies and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to interact effectively in an intercultural context with clients, co-workers and stakeholders; to provide appropriate and accurate information to relevant people

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REQUIRED SKILLS AND KNOWLEDGE
• initiative and enterprise skills to access and consult relevant personnel; to establish organisational policies and procedures for education and training delivery • literacy skills to record information accurately and to prepare professional reports • management skills to: • manage work activities of others and review performance • lead a team, mentor, coach and train others or facilitate coaching or training • manage education and training resource development and provision, education and training records, student education and training services • ensure compliance with organisational policies and procedures, and external standards • manage risk, manage for quality and manage change • planning and organising skills to review and maintain records; to comply with legislation, regulations and standards • problem-solving skills to negotiate and resolve problems in the international education context; to review and adjust policy and procedures with others • self-management skills to reflect on and improve own work skills and performance; to respond appropriately in difficult situations • technology skills to maintain an accessible contact list.
Required knowledge
• application of policies and procedures, and observance of relevant legislation and regulatory requirements and organisational policies and procedures in an international education services environment • client services standards • education and training management principles and practices including applicable Australian Quality Training Framework (AQTF) Standards, use of nationally endorsed Training Packages and competencies, records and awards requirements, positions and work roles • leadership and mentoring approaches, and principles and practices of continuous improvement • limitation of responsibility regarding compliance (staff role parameters) • student education and training support services and resources management processes and roles e.g. learning support services, pastoral care services, budgeting, report writing.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • managing faculty or section staff, resources, records to support delivery of education and training programs • facilitating compliance and rectifying non-compliance with relevant legislation, regulations and standards for delivery of education and training • knowledge of relevant legislation and regulatory requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports on how the candidate manages international education and training processes • analysis of projects, case studies, completed records and reports developed by the candidate • review of forward estimates developed in relation to financing organisational education and training programs • oral or written questioning to assess knowledge of education and training management principles and practices • evaluation of review of administrative support for organisation's education and training programs • review of documentation recording, reporting and rectifying non-compliance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

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EVIDENCE GUIDE	
	• other educational administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legislative and regulatory requirements may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to: • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance • business compliance relevant to work roles • child protection legislation and regulations • Education Services for Overseas Students (ESOS) Act 2000, and subsequent amendments and related legislation • employment, education and training - relevant to onshore and offshore provision • environmental issues • ESOS Act Assurance Fund requirements • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT) • National Code of Practice for Registration Authorities and Providers of International Education and Training • occupational health and safety

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RANGE STATEMENT	
	• privacy and confidentiality • Transnational Quality Strategy (2005) • workplace employment practices and industrial relations • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices
Standards may include:	• Australian Standards relevant to industry training conducted by the international education organisation • AQTF Standards for Registered Training Organisations (quality assurance mechanism for vocational education and training sector) • competency standards in endorsed Training Packages being provided by international education organisation • standards for teaching English to international students such as those developed by the National ELT Accreditation Scheme (NEAS)
Resources may include:	• financial resources such as budget allocations to support education and training programs • human resources such as teaching and training staff, administration staff to support education and training program delivery • physical resources such as adequate physical space, learning and assessment materials, recreational facilities, resources related to religious and cultural observance and requirements
Relevant personnel may include:	• administrative support personnel • directors • external writers or learning/assessment materials developers • faculty managers • managers • supervisors • teachers, trainers, tutors
Student learning and assessment requirements may include:	• developing learning and assessment strategies and individual assessment plans • integrity of assessments and records of learning and assessment events

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RANGE STATEMENT	
	• sufficiency and authenticity of assessments including submitted work • validity of assessment tools and processes
Awards may include:	• Australian Qualifications Framework (AQF) qualifications • Statement of Attainment/s awarded on achievement of an individual unit/s of competency • qualifications awarded in accordance with relevant legislation and standards

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU505A Manage international client accommodation services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage and support the provision of accommodation services for a range of international clients, ensuring compliance with relevant legislation and regulations in relation to accommodation services. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals managing client accommodation services for a range of international clients in an international education provider context. They could work in the administration of education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Manage communication and information in relation to accommodation for international clients	1.1. Define and document roles and responsibilities in relation to accommodation services for ***international clients*** in an international education organisation 1.2. Identify ***appropriate accommodation options*** for international clients 1.3. Identify and communicate accommodation services policy and procedures to international clients and other stakeholders 1.4. Consult with international clients and other stakeholders about accommodation needs 1.5. Identify and record details of accommodation needs of individual international students 1.6. Make available current information on appropriate accommodation options including details of facilities

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ELEMENT	PERFORMANCE CRITERIA
	and services of accommodation providers 1.7. Establish and implement processes for dissemination, review and update of accommodation-related information 1.8. Evaluate changing needs and lifestyles of international clients and associated accommodation requirements, and provide appropriate advice
2. Implement organisational policies and procedures for managing accommodation for international clients	2.1. Examine and evaluate accommodation policies 2.2. Establish procedures for managing accommodation in view of trends in international client demand 2.3. Establish procedures for determining and reviewing suitability of appropriate accommodation options to meet the needs of a range of international clients 2.4. Identify and implement improvements for policies and procedures, as approved in line with organisational procedures
3. Manage accommodation placements for international clients	3.1. Establish and implement processes to compile and maintain accurate information about appropriate accommodation options to meet the needs of a range of international clients 3.2. Discuss options with clients and colleagues, and arrange visits to accommodation providers including pre-placement visits 3.3. Establish processes for feedback from international clients, providers and staff on suitability and quality of accommodation services and facilities 3.4. Implement procedures to monitor and supervise accommodation facilities as applicable 3.5. Receive and act on reports on accommodation services and facilities, and disseminate reports according to organisational policies and procedures
4. Facilitate legislative compliance by staff, providers and clients regarding accommodation for international clients	4.1. Make available ***relevant legislative documents*** to accommodation providers, international clients and staff as required 4.2. Prepare presentations to accommodation providers in relation to their obligations under relevant legislation 4.3. Establish processes for assessing accommodation provision for clients under 18 years of age 4.4. Ensure policy and grievance procedures are compliant with ***relevant legislative and regulatory compliance requirements***, and clearly

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ELEMENT	PERFORMANCE CRITERIA
	communicated to international clients, accommodation providers and staff 4.5. Establish strategies for the continuous improvement of accommodation services

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication skills to interact effectively in an intercultural context with clients, co-workers and stakeholders
• initiative and enterprise skills to:
  • contribute to improvement of organisational procedures and policies
  • work within relevant legislative and regulatory frameworks
  • make appropriate referral to external agencies and groups
  • follow complaints procedures, deal sensitively with clients and participate in complaint and conflict resolution processes, ensuring that the processes comply with legislation and organisational policies
  • effectively liaise with external and internal, clients and stakeholders
• learning skills to interpret relevant legislation, codes and regulations
• literacy skills to prepare reports and documents for relevant stakeholders
• negotiation and conflict management skills
• planning and organising skills to develop, review and disseminate accurate accommodation provider lists; to facilitate regular effective visits to providers
• problem-solving skills to resolve problems in managing and providing accommodation services
• self-management skills to manage own work and the work of others for accommodation services provision; to manage time and client appointments
• teamwork skills to lead a team and to review procedures in cooperation with other team members
• technology skills to manage accommodation information databases.

Required knowledge
• culturally appropriate requirements in accommodation options to meet cultural preferences in food preparation, hygiene and lifestyle • insurance needs appropriate to accommodation options • legislation governing welfare for students under 18 years of age

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REQUIRED SKILLS AND KNOWLEDGE
• management principles and practices and client services standards in an international education organisation context • processes for dealing with accommodation issues and conflict • range of accommodation options appropriate to particular international clients • responsibilities of supervisors of accommodation and institutional managers • sources of cultural or language-based assistance • tenancy legislation.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • informing clients about and providing appropriate accommodation options for international clients • ensuring culturally appropriate provision of accommodation • demonstrating protocols for client advocacy, privacy, confidentiality and dealing appropriately with grievances and conflicts • knowledge of legislation governing welfare for students under 18 years of age and tenancy legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports on how the

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EVIDENCE GUIDE	
	candidate manages international client accommodation services • analysis of projects, case studies, completed records and reports developed by the candidate • review of documentation recording accommodation needs of individual international students • oral or written questioning to assess knowledge of culturally appropriate requirements in accommodation options to meet cultural preferences in food preparation, hygiene and lifestyle • review of procedures established for managing accommodation • review of documentation outlining action taken on reports received on accommodation services and facilities • evaluation of strategies established for the continuous improvement of accommodation services.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
International clients may include:	• accommodation providers • dependants of international students • international student recruitment agents • international students • visiting staff in colleges, schools and universities • visiting parents or significant others of international students

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RANGE STATEMENT	
Appropriate accommodation options may include:	• accommodation provided and managed by education providers • boarding house accommodation • homestay accommodation • hostel accommodation • independent rental accommodation • other options e.g. short-term volunteering by accommodation hosts • supervised accommodation for international students under 18 years of age
Relevant legislative documents may include:	• copies of, or documented hyperlinks to, relevant legislation, regulations and codes listed below • plain English summaries of requirements of legislation and regulations

Relevant legislative and regulatory compliance requirements may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:
	  • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance
	  • business compliance relevant to work roles
	  • child protection legislation and regulations
	  • Education Services for Overseas Students (ESOS) Act 2000, and subsequent amendments and related legislation
	  • employment, education and training - relevant to onshore and offshore provision
	  • environmental issues
	  • ESOS Assurance Fund requirements
	  • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT)
	  • National Code of Practice for Registration Authorities and Providers of International

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RANGE STATEMENT	
	Education and Training • occupational health and safety • privacy and confidentiality • relevant state/territory tenancy Acts • relevant state/territory education legislation and regulations pertaining to overseas student accommodation for students under 18 years of age • Transnational Quality Strategy (2005) • workplace employment practices and industrial relations • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU506A Facilitate international education events and programs

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to facilitate, contribute to, support, and monitor events and programs in an international education environment. It includes making presentations at international education events and contributing to a range of related program activities. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who manage and facilitate a range of international education events and programs in an international education provider context. They could work in the administration of education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Make event and program decisions	1.1. Research industry and organisational needs for ***events and programs*** 1.2. Consult ***clients and stakeholders*** for ideas and to establish priorities for events and programs 1.3. Make decisions on proposed event and program with ***relevant personnel*** based on identified requirements and financial viability 1.4. Establish and clarify with team, role of team members and ***work roles*** 1.5. Determine and schedule events and programs to be presented over an agreed period 1.6. Conduct risk assessment and apply risk management strategies in relation to specific events and programs
2. Develop a strategic	2.1. Refer to organisational policies and procedures for

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ELEMENT	PERFORMANCE CRITERIA
plan for international education events and programs	involvement in international education events and programs 2.2. Apply cross-cultural communication strategies in planning events and programs 2.3. Establish and confirm dates for specific events and programs 2.4. ***Plan*** for activities and include events planning within the strategic or other overarching organisational plan 2.5. Arrange required contracts and insurance with relevant personnel, monitoring progress and finalisation 2.6. Communicate to relevant personnel and ensure compliance with, ***relevant legislation***, ***regulations and codes*** applicable to events and programs, including in relation to occupational health and safety (OHS) and security
3. Allocate resources for specific events and programs	3.1. Identify or appoint coordinators and development and delivery teams to be involved in specific events and programs 3.2. Clarify and record coordinator and team roles in relation to specific event or program 3.3. Consult with relevant personnel and key stakeholders for input into plans for specific event or program 3.4. Ensure specific events and programs are planned by selected teams, under appropriate leadership as appointed 3.5. Identify required ***information***, check specific plans and ensure resource requests from teams are fulfilled 3.6. Ensure plans are approved and resources allocations made
4. Monitor preparations for events and programs	4.1. Identify and apply organisational approval processes for inclusion of, and contact with, key stakeholders in a range of roles for events and programs 4.2. Receive reports regarding contact and arrangements made with and for, relevant clients and other stakeholders 4.3. Provide assistance and support to coordinators and teams during the preparation phase 4.4. Provide assistance and support to marketing personnel in relation to promotional activities

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ELEMENT	PERFORMANCE CRITERIA
	4.5. Monitor resources provision and use by team for specific events and programs through meetings and organisational reporting processes
5. Facilitate and deliver presentations for events and programs	5.1. Prepare own and others' ***presentations*** for delivery at specific event or program 5.2. Approve others' presentations for delivery at events and programs 5.3. Deliver presentations at events and programs, in relation to international education 5.4. Receive feedback on presentations and review performance of self and others to improve delivery
6. Facilitate and monitor events and programs	6.1. Monitor on time provision of required materials and equipment to clients and other stakeholders at specified destinations 6.2. Monitor compliance with relevant legislation, regulations and codes in relation to the provision and distribution of goods and information 6.3. Manage communication and process flow to ensure on time supply and receipt of required resources to specified persons and destinations 6.4. Monitor activities to facilitate supply of information and smooth flow of presentations during events and programs 6.5. Monitor, and facilitate where necessary, assistance and support to clients and other stakeholders during events and programs 6.6. Make decisions and communicate to relevant personnel regarding departure from regular practices to meet contingencies arising during events and programs
7. Facilitate continuous improvement processes for events and programs	7.1. Monitor compliance with organisational policies and procedures for planning and conducting events and programs 7.2. Establish communication and reporting lines to inform relevant personnel regarding progress and outcomes 7.3. Facilitate evaluation of client and other stakeholder satisfaction regarding processes and outcomes 7.4. Use feedback from clients and stakeholders to promote continuous improvement in planning and conducting events and programs 7.5. Make adjustments to work practices and

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ELEMENT	PERFORMANCE CRITERIA
	organisational policies and procedures for planning and conducting events and programs, in line with organisational procedures

Required Skills and Knowledge

Required knowledge
• financial administration related to contract receipts and payments • internal and external clients, presenters and support persons involved in managing and participating in events and programs • international education industry environment • legislative and regulatory compliance issues in relation to facilitating international education events and programs e.g. developing contracts, supplying goods and services and consumer protection, OHS, Education Services for Overseas Students (ESOS) Act 2000 and associated codes • resource requirements for international education events and programs, information provision and distribution strategies • risk management • stakeholders in international education events and programs • types of contracts applicable to an international education organisation, contractual and legal agreement documentation, parties to contracts • types, purposes and formats of international education events and programs.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • applying appropriate cross-cultural communication skills and knowledge in facilitating international education events and programs • coordinating, planning, facilitating and managing international education events and programs

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EVIDENCE GUIDE	
	• knowledge of legislative and regulatory compliance issues in relation to facilitating international education events and programs.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports on how the candidate facilitates events • analysis of projects, case studies, completed records and reports developed by the candidate • review of research into industry and organisational needs for events and programs • review of contracts and insurance arranged • observation of presentations delivered at events and programs • oral or written questioning to assess knowledge of resource requirements for international education events and programs • evaluation of assistance and support provided to coordinators and teams during the preparation phase • evaluation of decisions made and communicated to relevant personnel regarding departure from regular practices to meet contingencies arising during events and programs.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Events and programs may include:	• briefings and social activities for student pre-departure • careers fairs, events and exhibitions • cultural festivals and religious celebrations e.g. Chinese New Year, Diwali • functions for welcoming agents and clients to the country • graduation and alumni events, dinners, award ceremonies • internal open days and information days • memorial services • multicultural days and activities • orientation sessions • overseas exhibitions and agent briefings • professional development orientation sessions, workshops, seminars, conferences • professional network events • recreational, social and educational activities • religious observances • social events connected to specific groups such as postgraduate dinners • trips and tours • various forums for disseminating information • visits to other international education organisation's open days and information days
Clients and stakeholders may include:	• internal clients such as section, department or faculty staff • international students • other clients of the organisation such as parents of students, homestay providers, consular staff, overseas agents, government and private organisations, departments and agencies, other educational organisations
Relevant personnel may include:	• coordinators, managers • in some cases, the presentation audience

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RANGE STATEMENT	
	• other stakeholders involved with facilitating events and programs • team members
Work roles may include:	• coordinating and managing the work of others • participation in a management team • participation in an event or program team
Planning for activities includes considering:	• contingencies • financial and resource allocations • marketing and operational strategies • resources

Relevant legislation, ***regulations and codes*** may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:
	  • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance
	  • business compliance relevant to work roles
	  • child protection legislation and regulations
	  • ESOS Act, subsequent amendments and related legislation
	  • consumer legislation such as that relating to trade practices
	  • employment, education and training - relevant to onshore and offshore provision
	  • environmental issues
	  • ESOS Assurance Fund requirements
	  • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT)
	  • National Code of Practice for Registration Authorities and Providers of International Education and Training
	  • OHS
	  • privacy and confidentiality

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RANGE STATEMENT	
	• Transnational Quality Strategy (2005) • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices

Information may include:	• information for students, staff, agents, presenters, support persons and other stakeholders covering:
	  • contact lists and details of students, personnel, participants
	  • organisational, educational, social, tourist and environmental information
	  • program activities
	  • programs, timetables, schedules and details for event presentations and delivery
	  • relevant legislative, regulatory, standards information, including for OHS and security
	  • travel information and advisories
	• information specific to agents and other clients:
	  • course and campus information
	  • educational standards and qualifications
	  • English language requirements for prospective applicants
	  • fees, refunds and grievance procedures
	  • government guidelines and regulations relating to the ESOS Act
	  • marketing and recruitment information
	  • partner institution information
	  • student services information
	  • study tour schedules and agreements
	  • travel schedules
	  • updated agreements and renewals of contracts
	• information specific to conference, seminar or workshop facilitators, presenters, attendees and support personnel including:
	  • available resources
	  • contacts
	  • event and program details including times, dates and venue
	  • papers and presentation or facilitation

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RANGE STATEMENT	
	requirements
Presentations may include:	• audio or video taped presentations • face-to-face delivery • information reports at team meetings • OHS workplace requirements • orientation information • presentation software or other presentation materials and electronic equipment • program information

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU507A Manage transnational offshore education programs

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage transnational offshore education programs including partnerships, twinning programs, and exchange and study abroad agreements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who manage transnational offshore education programs in an international education provider context. They could work in the administration of education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Manage strategic plans to establish transnational offshore education programs	1.1. Develop and seek approval for strategic plans and protocols for working in ***transnational offshore education programs***
	1.2. Identify potential groups and partners with whom transnational offshore education programs could be developed, and analyse the suitability of a range of programs
	1.3. Identify risk factors and entry and exit strategies, and incorporate these into strategic plans for transnational offshore education program promotion and delivery
	1.4. Propose budgets and financial models for transnational offshore education program promotion and delivery, and agree with organisational stakeholders
	1.5. Establish and review procedures for establishing,

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ELEMENT	PERFORMANCE CRITERIA
	managing and evaluating transnational offshore education programs
2. Establish and develop relationships with offshore clients and partners	2.1. Manage consultation and negotiation with potential ***international clients and partners*** 2.2. Monitor correspondence and follow-up action with international clients and partners 2.3. Arrange meetings and interviews with current and prospective international clients and partners 2.4. Manage records of discussions and correspondence with international clients and partners 2.5. Develop plans for ongoing relationship management with international clients and partners
3. Develop and review contracts and agreements for transnational offshore education program delivery	3.1. Apply risk management processes to ***contracts*** and agreements with regard to transnational offshore education programs 3.2. Review and manage contracts related to transnational offshore education programs, according to organisational policies and ***relevant legislation***, ***regulations and codes*** 3.3. Seek and use, advice in developing and managing contracts related to transnational offshore education programs 3.4. Adapt contracts and agreements to a range of transnational offshore education program delivery functions
4. Develop and promote transnational offshore education programs to clients and stakeholders	4.1. Provide information about transnational offshore education programs to clients and stakeholders 4.2. Adapt methods of promotion for transnational offshore education programs for a range of clients and stakeholders 4.3. Include relevant organisational staff in consultation and negotiation about delivery methods and arrangements for transnational offshore education programs 4.4. Review client services delivery for transnational offshore education programs and incorporate results in forward planning strategies 4.5. Develop improvement strategies for transnational offshore education programs and communicate to clients and stakeholders 4.6. Manage access to and use of, information and services with regard to transnational offshore

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ELEMENT	PERFORMANCE CRITERIA
	education programs 4.7. Identify and implement improvements to communication processes in transnational offshore education programs
5. Manage infrastructure and operations for transnational offshore education programs	5.1. Propose and develop models for service and transnational offshore education program delivery 5.2. Develop ***client services*** to meet client and stakeholder needs in transnational offshore education program delivery 5.3. Develop and manage operational procedures and protocols for transnational offshore education programs 5.4. Apply financial models to delivery of transnational offshore education programs 5.5. Survey client satisfaction on processes and outcomes of transnational offshore education programs and make recommendations for improvements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to interact effectively in an intercultural context with clients, co-workers and stakeholders; to consult with diverse international clients and to manage relationships; to negotiate and manage conflict in difficult and complex situations
- initiative and enterprise skills to work effectively with others in offshore settings
- learning skills to understand and comply with relevant legislation, regulations and standards
- literacy skills to record and report information accurately
- planning and organising skills to manage administrative functions and performance; to plan and deliver transnational offshore education program support within relevant organisational policies and procedures
- problem-solving skills to solve problems with transnational offshore education; to review and manage contracts and agreements
- self-management skills to manage own work and the work of others; to provide appropriate, adequate and timely information to relevant people
- technology skills to use technology for transnational offshore education

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REQUIRED SKILLS AND KNOWLEDGE
communication in work role.
Required knowledge
• business planning and financial models relevant to transnational offshore education programs; international banking principles and practices, and methods for transfer of funds internationally • characteristics of transnational offshore education programs and educational trade practices • client services standards • impact and influence of culture on offshore education and training delivery • intellectual property rights and issues, and copyright legislation • legal liability in contracts and agreements • legislative and regulatory requirements • limitations of responsibility in dealing with offshore partners • methods for promoting programs to offshore partners • online delivery and communication methods • organisational policies and procedures relating to offshore partnerships • principles of transnational offshore education program development and delivery • protocols for dealing with incidents in offshore locations • responsibilities of working with staff in offshore settings • student and staff support services and systems e.g. learning support, counselling and interpreting services in offshore settings • support systems and procedures in receiving countries and institutions • technology relevant to promotion, delivery and management of transnational offshore education programs, and managing associated projects (including adjusted technology for people with a disability, where required) • technological requirements and support mechanisms in online delivery.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing and managing transnational offshore education contracts and agreements

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EVIDENCE GUIDE	
	• applying effective cross-cultural communication skills in relation to international education activities • managing administration of transnational offshore education programs in line with Australian and international legislation, and organisational policy guidelines • knowledge of business planning and financial models relevant to international education programs.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports on how the candidate manages transnational offshore education programs • analysis of projects, case studies, completed records and reports developed by the candidate • oral or written questioning to assess knowledge of characteristics of international education programs and educational trade practices • review of analysis of the suitability of a range of international education programs • review of risk factors and entry and exit strategies incorporated into strategic plans for international education program promotion and delivery • review of information provided to clients and stakeholders about international education programs • evaluation of operational procedures and protocols developed for international education programs.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Transnational offshore education programs may include:	• associated projects • exchange and study abroad agreements • franchises • offshore or cross-border education and training programs conducted 'in a country other than Australia by an Australian-approved provider, where the delivery includes a face-to-face component' (Transnational Quality Strategy, 2005) • partnerships • twinning programs
International clients and partners may include:	• accredited providers • contractors • education and training organisations (all sectors) in countries other than Australia • franchisees • overseas corporations • overseas government agencies
Contracts may include:	• agreements for one-off or ongoing supply of goods or services • electronic or paper-based agreements • formal agreements with Australian or overseas individuals, contractors, corporations, individuals and government agencies

Relevant legislation, ***regulations and codes*** may include:	• applicable legislation in offshore settings
	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:
	  • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance
	  • business compliance relevant to work roles
	  • child protection legislation and regulations

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RANGE STATEMENT	
	• Education Services for Overseas Students (ESOS) Act 2000, subsequent amendments and related legislation • consumer legislation such as that relating to trade practices • employment, education and training - relevant to onshore and offshore provision • environmental issues • ESOS Assurance Fund requirements • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT) • National Code of Practice for Registration Authorities and Providers of International Education and Training • occupational health and safety • privacy and confidentiality • Transnational Quality Strategy (2005) • workplace employment practices and industrial relations • government policy on educational trade in countries where transnational offshore education programs are conducted such as Free Trade Agreements (FTAs) and General Agreement on Trade and Services (GATS) • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices
Client services may include:	• cross-cultural training for staff and other clients • staff support for relocation and family services • support for development of program materials • support for students taking offshore programs • technological back-up for programs conducted internationally

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU508A Manage international education financial and administrative processes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide sound financial and administration management across a range of functions in an international education organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who manage finances and administration for educational programs in an international education provider context. They could work in the administration of education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational training and education, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Implement policies and procedures for managing finance and administration	1.1. Identify and contribute to the development of policies and procedures for managing finance and administration 1.2. Apply ***risk assessment and risk management strategies*** to managing finance and administration 1.3. Manage finance and administration compliance with organisation policy and procedures and ***relevant legislation***, ***regulations and codes*** 1.4. Establish and follow communication processes to give and receive information, including the production of finance and administration reports 1.5. Consult with work and management teams, and other ***relevant stakeholders*** in relation to decision making on finance and administration matters 1.6. Review, monitor and implement agreed changes to finance and administration management, in line with

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ELEMENT	PERFORMANCE CRITERIA
	organisational policies and procedures
2. Contribute to financial plan development and implementation	2.1. Interpret and apply organisational strategic plan to finance and administration planning and management, in a team environment 2.2. Consult with ***relevant personnel*** to gather information for input into financial plan 2.3. Develop financial plan with management team 2.4. Present financial plan for approval, in line with organisational policies and procedures 2.5. Implement approved financial plan 2.6. Periodically review financial plan's accord with organisational objectives and outcomes, and gain approval for adjustments, in line with organisational policies and procedures
3. Source and contribute to the management of financial and funding allocation	3.1. Identify sources of finances and funds 3.2. Identify organisational financial requirements with work and management teams 3.3. Monitor negotiation, financing and funding of contracts, and implement contract processes to finalisation 3.4. Manage finance of the organisation in a team environment, according to organisational procedures and relevant legislation, regulations and codes 3.5. Provide financial reports to relevant personnel, in line with organisational policies and procedures
4. Monitor administration of the accounting function	4.1. Contribute to the establishment of procedures for the financial transactions of an international education organisation, including employee remuneration and contract payments 4.2. Monitor implementation of finance and administration procedures 4.3. Consult with relevant stakeholders with respect to complying with legal requirements for accounting 4.4. Contribute to financial accounting reports produced and presented, in line with organisational procedures
5. Manage student admission processes and fee records	5.1. Monitor ***admissions processes*** to ensure compliance with relevant legislation, regulations and codes and organisational policies and procedures 5.2. Monitor accurate completion of admissions documents and database entries, tracking deficiencies and ensuring rectification where

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ELEMENT	PERFORMANCE CRITERIA
	required, to meet compliance requirements 5.3. Review admissions policies and procedures to identify ongoing improvements 5.4. Check clients' agreed fee instalments and payment schedules against receipt documents and dates, to facilitate on time collection of correct monies 5.5. Monitor student fee receipt procedures to facilitate correct processing and recording, and bank in correct account, in accordance with relevant legislation, regulations and codes 5.6. Draw down student fees to operational bank accounts according to organisational policies and procedures and relevant legislation, regulations and codes 5.7. Process and verify student fee refunds in accordance with relevant legislation, regulations and codes and organisational refund policy
6. Manage general administration functions	6.1. Manage administration of functions in accordance with ***work role*** in the management team and governance requirements 6.2. Consult organisation staff regarding own and work team performance in functional administration 6.3. Receive reports from work team on action taken on identified issues 6.4. Develop reports on administration matters to the management team and for governance related requirements, in line with organisational policy 6.5. Discuss and clearly communicate matters of administration, such as any adjustments to administration policies and procedures, to relevant personnel 6.6. Provide support to members of the management team, as required, with education and training systems and financial administration

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills
• communication skills to interact effectively in an intercultural context with clients, co-workers and stakeholders; to manage information and communication processes; to consult and communicate with teams, board or committee of management, and other relevant stakeholders about financial management and administration matters • initiative and enterprise skills to make referrals to appropriate people or agencies; to manage for quality; to review and adjust policies and procedures • literacy skills to produce documents and finance-related reports • numeracy skills to manage financial processes and to actively contribute to financial planning • planning and organising skills to manage administrative processes; to facilitate implementation of policies and procedures • problem-solving skills to negotiate with people in issues resolution processes • self-management skills to prioritise own activities; to supervise the work of others; to schedule and arrange interviews and meetings • technology skills to use technological and electronic equipment, relevant software applications, telephones, e-communication media.
Required knowledge
• international education industry and the structure and functions of an international educational organisation • relevant legislative, regulatory and standards compliance requirements in relation to international education, contracts, consumer protection, trade practices, occupational health and safety (OHS), corporations and financial transactions, employment (particularly relating to remuneration) and taxation.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • establishing and implementing policies and procedures including risk management strategies, to manage finance and administration in an international

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EVIDENCE GUIDE	
	education organisation • resolving issues in relation to finance, funding, and administration through appropriate communication, consultation, reporting and, where necessary, referral to legal or accounting external professionals • knowledge of relevant legislative, regulatory and standards compliance requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports on how the candidate manages financial and administrative processes in an international education context • analysis of projects, case studies, completed records and reports developed by the candidate • review of financial plan developed with management team • oral or written questioning to assess knowledge of structure and functions of an international educational organisation • evaluation of any adjustments made to the financial plan • review of communication of administration matters to relevant personnel, such as adjustments to administration policies and procedures.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units • customer service units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Risk assessment and risk management strategies may include:	• ensuring adequate information provision, communication, coaching and training of staff • ensuring own and subordinate staff compliance with legislative and regulatory requirements, including those for OHS, and organisational policies and procedures • identifying potential areas of risk, assessing its likelihood and consequences, and identifying adequate controls and mitigation strategies

Relevant legislation, ***regulations and codes*** may include:	• Australian and/or international accounting standards
	• corporations legislation in relation to financial transactions
	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:
	  • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance
	  • business compliance relevant to work roles
	  • child protection legislation and regulations
	  • Education Services for Overseas Students (ESOS) Act 2000, subsequent amendments and related legislation
	  • employment, education and training - relevant to onshore and offshore provision
	  • environmental issues
	  • ESOS Assurance Fund requirements
	  • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC),

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RANGE STATEMENT	
	Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT) • National Code of Practice for Registration Authorities and Providers of International Education and Training • occupational health and safety • privacy and confidentiality • Transnational Quality Strategy (2005) • workplace employment practices and industrial relations • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices • taxation and employment related legislation
Relevant stakeholders may include:	• accountants and financial auditors • board or committee of management • chief executive officer, managers, leaders, coordinators • consular staff, government or agency personnel • internal users of purchased goods and services • OHS specialists • overseas agents • owner • parents • personnel authorised to commit the organisation to purchases • specialist personnel involved in purchasing, asset maintenance and finance • students • supervisors
Relevant personnel may include:	• board or committee of management • chief executive officer • senior level managers • team leaders and managers • work team
Admissions processes may include:	• accurately providing services and advice including collection on arrival, accommodation, student orientation programs • administering records management including

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RANGE STATEMENT	
	maintaining current contact details • checking all documentation requirements and entry requirements are met (including visa requirements, payment of correct fees) • compliance with relevant industry codes of practice and national codes in relation to international education • determining and advising of application outcome • generating records manually and using databases such as Provider Registration and International Student Management System (PRISMS), in accordance with external requirements and organisational policies and procedures • receipt and tracking of student applications
Work role may include:	• performance of work tasks, mainly autonomously • participation in a management team, with responsibility to more senior managers, chief executive officer and/or board/committee

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBEDU509A Use information to enhance international education work role performance

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify, locate, access, collect and apply information relevant to own and team performance in an international education services environment. Its focus is on applying industry knowledge to work tasks in a range of settings and professional domains. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in the international education industry providing administration services at a range of levels of responsibility. They could work in the administration of education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and public or private.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Locate and record industry information relevant to work role	1.1. Establish and maintain ***contacts***, ***networks*** and ***sources of information***
	1.2. Access information on work role, skills and attributes in international education organisations from appropriate sources
	1.3. Apply information in work situations to assist effectiveness in ***work role***
	1.4. ***Record*** and securely store relevant information, reviewing and updating as necessary
	1.5. Collate and record contact details of ***relevant individuals***, ***groups and agencies*** in an accessible location
2. Enhance work quality	2.1. Source information on international education services and operations and use it effectively
	2.2. Identify employer and employee ***rights and responsibilities*** in international education services organisations under workplace relations legislation

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Identify role, responsibilities and criteria for performance review based on relevant work standards, key activities and own job description 2.4. Develop processes to improve work practices using collated and analysed information 2.5. Disseminate information to colleagues in similar work roles and to other appropriate stakeholders 2.6. Observe privacy and confidentiality requirements regarding personal or organisational information, in accordance with relevant legislation
3. Use information to improve own and team work practices	3.1. Review own performance in work role to identify gaps in work skills and future skill requirements 3.2. Source and act upon professional development and training opportunities for self and team 3.3. Develop and use ***systems of reporting and performance appraisal*** to assess own and team performance 3.4. Apply processes to improve own and team work practices by referring to research and best practice in international education services, in accordance with organisational policies 3.5. Evaluate effectiveness of processes and strategies

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical and research skills to critically assess information relevance, accuracy and completeness; to record information accurately; to integrate information into reports and presentations; to report information (oral and written) in a range of formats and for a range of individuals or groups • communication skills to interact effectively in an interculturalcontext with clients, co-workers, team members and other stakeholders; to negotiate in relation to performance agreements, professional development and training opportunities • initiative and enterprise skills to source information on work practice improvement opportunities such as client service standards, work standards, best practice examples, and professional development and training opportunities; to develop performance improvement plans; to refer to relevant legislative and regulatory

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REQUIRED SKILLS AND KNOWLEDGE
frameworks • learning skills to participate in formal and informal professional development • planning and organising skills to identify and address future skills requirements • self-management skills to manage time • technology skills to use a computer and other office equipment to access, process and research information from a range of sources including websites; to use electronic communication technology.
Required knowledge

• international education environment including specific organisational work environment and workplace practices such as:
  • best practice in international education services
  • quality principles and processes, client services and work standards
  • relevant professional associations, employer and employee associations
  • roles and responsibilities of workers in international education
• sources of information, contacts support networks and referral systems
  • sources of professional development opportunities
• cross-cultural communication principles and practices in relation to diverse countries and cultures including formal and informal communication channels
• overview of trends in Australian international education, statistics and analysis
• relevant current legislation for international education services such as the Education Services to Overseas Students Act 2000and associated regulations and codes, and employment related information and regulations.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying issues and sources of information in relation to improving workplace performance in an international education environment • developing and applying strategies to improve international education work practices

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EVIDENCE GUIDE	
	• knowledge of relevant current legislation for international education services.
Context of and specific resources for assessment	Assessment must ensure: • access to opportunities to participate in a range of practical exercises and projects • access to current relevant reference materials, professional expertise, and assessment equipment and materials.
Method of assessment	A range of assessment methods should be used t assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports • analysis of projects, case studies, completed records and reports developed by the candidate • review of recorded contact details for individuals, groups and agencies • review of processes developed to improve work practices • analysis of identified work skills gaps and identified future skills requirements • review of reporting and performance appraisal systems developed to assess own and team performance • oral or written questioning to assess knowledge of cross-cultural communication principles and practices.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other educational administration units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different

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RANGE STATEMENT	
work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Contacts, ***networks*** may include:	• clients • colleagues or team members • Department of Education, Science and Training (DEST) - including Australian Education International • Department of Health and Ageing (DOHA) • Department of Immigration and Citizenship (DIAC) • employee and employer organisations • educational institutions • international education professional associations • other international education organisations • state/territory education departments • supervisors or other organisation personnel
Sources of information may include:	• contacts and networks • education and training organisation websites - national and international • employer and employee associations • formal and informal communication channels • government departments and agencies • professional associations
Information may include:	• academic research relating to international education services • cultural information describing educational practice in source countries • employer and employee association publications • examples of programs and activities to support students • intelligence obtained through formal and informal communication channels • information describing cultural practices in source countries • job descriptions and position specifications for work roles

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RANGE STATEMENT	
	• market intelligence for source countries • organisational policies and procedures • overseas student health cover information • professional association publications and codes of practice • records of work practice in own and other organisations • relevant legislation and codes of practice • statistics and reports relating to international education • work standards
Work role may include:	• type and level of work being undertaken in international education organisation • typical roles and responsibilities

Recording information may include:	• documentation in:
	  • internal organisational documents
	  • job descriptions and position specifications
	  • performance review documents
	  • records of discussions with colleagues
	  • reports, publications, conference papers, training sessions (attended or presentations made at)
	  • staff development plans

Relevant individuals, groups and agencies may include:	• clients • colleagues and team members • DEST • DOHA • DIAC • educational institutions • employee and employer organisations • professional associations • state/territory education departments • supervisors and other organisation personnel
Rights and responsibilities may include:	• awards, enterprise agreements, contracts and industrial instruments (e.g. job specification, industry standards, performance agreements) relevant to the work role • workplace relations legislative requirements for employers and employees
Systems of reporting and	• data from tailored software

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RANGE STATEMENT	
performance appraisal may include:	• feedback from peers, customers or clients • qualitative or quantitative measurement of performance • perspective of manager • perspective of person being reviewed • range of systems for describing and evaluating what an individual or group achieves against a set of agreed criteria or key performance indicators

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU701A Investigate current trends in internationalisation of education

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to apply an overview of current trends in the internationalisation of education and its implications within a specific international education practice and international education sector. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to administrators with managerial responsibility who are required to apply sound knowledge of current trends in international education to their business practice. They will be managing education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational training and education, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Analyse the key features of an Australian education sector	1.1. Distinguish the representative characteristics of an Australian ***education sector*** 1.2. Determine the relationships between the private and public facets of the selected education sector 1.3. Identify and describe the role of the selected education sector in the Australian economy 1.4. Analyse the ***main influences*** on selected education sector activities 1.5. Analyse the business and economic rationale for programs in the selected education sector
2. Determine the implications of the internationalisation of education for an	2.1. Compare selected education sector, including its relationship with industry if appropriate, with the same sector in a range of other countries 2.2. Interpret and define ***internationalisation*** as it

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ELEMENT	PERFORMANCE CRITERIA
Australian education sector	applies to education generally and specifically to selected education sector 2.3. Discuss the significance of international operations for the selected education sector taking into account diverse stakeholders 2.4. Determine the impact of internationalisation on ***specific examples of Australian products and services*** in the selected education sector
3. Analyse strategic trends operating globally in relation to an Australian education sector	3.1. ***Summarise*** available information on the scale of Australian international education activity in the selected education sector 3.2. Analyse the relationship between socioeconomic development and requirements of the selected education sector globally 3.3. Discuss some of the ***funding models*** supporting the selected education sector's activity 3.4. Determine the impact of political and trading alliances on the selected education sector
4. Analyse the requirements of an Australian education sector operating as a business in an international environment	4.1. Discuss the commercial imperatives that underpin international education activities 4.2. Discuss the responsibilities of an educational entrepreneur operating internationally 4.3. Provide examples of the ***risks and challenges*** associated with international education activities from a business perspective 4.4. Assess the strengths and weaknesses of Australian educational entrepreneurial activity in relation to identified risks and challenges 4.5. Compare these strengths and weaknesses with those of a major international competitor or competitors
5. Critique innovative practice in international education	5.1. Identify examples and case studies of innovative practices in international education 5.2. Analyse innovative practices to determine success factors and challenges 5.3. Critique identified innovative practices to determine feasibility of broader application

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to analyse complex issues and to complete oral and written reports on findings in relation to international education
- initiative and enterprise skills to identify human resources and text resources to aid research
- learning skills to research and analyse information about international education strategic trends and implications for business requirements
- literacy skills to read and analyse academic texts and journals, to take notes and to use common genres of academic discourse, oral and written
- numeracy skills to read and understand statistics about international trade planning and organising skills to prepare for research
- problem-solving skills to research and analyse current situations and trends in international education
- self-management skills to conduct focussed research
- technology skills to use the internet to access literature and statistics about international education.

Required knowledge

- communication and technological developments
- comparison with education sectors in other countries and status of education sectors in other countries
- comparison with major international competitors
- competitiveness of selected education sector internationally
- implications for selected education sector
- internationalisation and its effects
- impact of internationalisation on educational management
- potential business opportunities
- professional development requirements for staff
- regional trends in selected education sector, including:
  - demand and supply
  - demographics, economic trends
  - funding priorities in region
  - partnerships with government
  - political and trading alliances
  - sector trends and priorities
  - statistics on sector international involvement
- risks and challenges

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REQUIRED SKILLS AND KNOWLEDGE

• selected education sector, including:
  • commercial imperatives
  • funding mechanisms and scope
  • impact of technologies
  • industry and business requirements and drivers
  • size, scope, target groups
  • pathways and links with other sectors
  • relevant national and local policies
  • strategic directions
• strengths and weaknesses of selected education sector.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • analysing an Australian education sector including its key features and the implications of internationalisation • analysing strategic international educational trends • investigating challenges and requirements of Australian education organisations operating in the international business environment • knowledge of risks and challenges.
Context of and specific resources for assessment	Assessment must ensure: • assessment relates to the education sector in which the candidate's international education activities are or are to be, conducted.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace

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EVIDENCE GUIDE	
	reports of on-the-job performance by the candidate • evaluation of supervisor's reports on how the candidate applies knowledge of the internationalisation of education • analysis of projects, case studies to which investigation findings are applied, completed records and reports developed by the candidate • review of analysis of the main influences on selected sector activities • evaluation of definition of internationalisation as it applies to education generally and specifically to selected education sector • review of documentation outlining risks and challenges associated with international education activities from a business perspective • evaluation of critique of identified innovative practices to determine feasibility of broader application • oral or written questioning to assess knowledge of selected education sector.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • with other units in the qualification in which this unit is packaged.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Education sector may include:	• English language training and preparatory education • higher education • postgraduate education

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RANGE STATEMENT	
	• school education (primary and secondary) • vocational education and training
Main influences on selected sector activities will include:	• industry requirements • government policies • strategic directions
Internationalisation may include:	• changes to curriculum content and pedagogies to address shifts towards globalisation of economies, work, communications and technologies, knowledge and culture • development of international education networks • educational provision for overseas students onshore and offshore • student and staff mobility
Specific examples of Australian products and services may include:	• customised products • offshore and onshore delivery • recognition initiatives • types of courses and programs
Summarising available information on the scale of Australian international education activity may include:	• country • dollar investment • kind of activity • major players
Funding models may include:	• government • overseas aid • private • public • scholarships and foundations
Risks and challenges may include:	• cultural • financial • political • reputational (for organisations, sectors and nations) • social

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU702A Establish international onshore education initiatives

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop, implement and evaluate international onshore education initiatives in one or more education sectors and within relevant international, cultural, legal and political contexts. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to administrators with managerial responsibility who are required to establish and evaluate international onshore initiatives. They will be managing education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational training and education, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Propose strategic directions for international onshore education initiatives	1.1. Analyse the diversity and economic significance of Australian ***international onshore education initiatives*** 1.2. Review the implications of the internationalisation of education for future onshore initiatives 1.3. Determine ***influences*** on the strategic directions of Australian international onshore education initiatives 1.4. Analyse the strengths and weaknesses of an international onshore education operator 1.5. Identify ***opportunities and threats*** likely to influence international onshore education initiatives
2. Develop strategies to deal with regulatory and financial issues relating to	2.1. Identify the responsibilities arising from ***relevant legislation***, ***regulations and codes*** in relation to the management of international onshore education initiatives

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ELEMENT	PERFORMANCE CRITERIA
international onshore education initiatives	2.2. Develop and implement approaches to communicate and manage regulatory responsibilities and bureaucratic requirements 2.3. Determine strategies to ensure that the business imperatives of international onshore education initiatives can be met
3. Develop appropriate marketing strategies for international onshore education initiatives	3.1. Investigate factors influencing international client selection of onshore education initiatives 3.2. Analyse available market information, including the impact of competitors, for international onshore education initiatives 3.3. Determine the appropriateness of international client qualifications for participation in onshore education initiatives 3.4. Determine effective communication protocols for use with potential clients and associated educational and diplomatic agencies 3.5. Determine marketing strategies that take into account cultural, marketing and business environments of relevant international client countries
4. Develop an implementation plan for international onshore education initiatives	4.1. Determine ***required resources*** for an international onshore education initiatives 4.2. Develop strategies to deal with possible conflict between educational, cultural, institutional and economic objectives that could affect the management of international onshore education initiatives 4.3. Determine ***procedures to deal with learning and cultural differences*** among clients of international onshore education 4.4. Determine professional development requirements of staff involved in international onshore education 4.5. Determine a process for costing international onshore education initiatives 4.6. Develop strategies to emphasise customer focus and to meet the ***pastoral care needs*** of clients of international onshore education
5. Develop evaluation procedures for international onshore education initiatives	5.1. Determine key areas of activity to be monitored and evaluated 5.2. Develop an appropriate evaluation methodology 5.3. Determine sources and type of information to be

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ELEMENT	PERFORMANCE CRITERIA
	used for making judgements 5.4. Develop appropriate tools and processes to gather and analyse information 5.5. Identify possible actions and strategies that effectively respond to evaluation outcomes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to work with people from a range of social, cultural and ethnic backgrounds • initiative and enterprise skills to develop effective business and educational practice in establishing international onshore education initiatives • learning skills to investigate and apply information to decision making in relation to establishing international onshore education initiatives • literacy skills to research strategic directions, legal requirements, marketing strategies, best practice systems and evaluation methodologies • numeracy skills to manage the financial and budgetary aspects of international onshore education initiatives • planning and organising skills to research and act upon opportunities • problem-solving skills to develop innovative strategies for identifying potential international onshore education initiatives • self-management skills to monitor own performance in relation to establishing new international onshore education initiatives • teamwork skills to work as part of an international onshore education management team • technology skills to use the internet to research relevant information.
Required knowledge
• best practice in international onshore education management • evaluation methodologies and tools • factors influencing strategic directions in international onshore education • marketing processes and strategies for international onshore education initiatives • relevant legislative and regulatory requirement, organisational policies, procedures and guidelines, standards, codes and industry codes of practice.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying, researching, reviewing and evaluating a specific international onshore education initiative including marketing and meeting, regulatory and financial requirements • knowledge of relevant legislative and regulatory requirements; organisational policies, procedures and guidelines; standards, codes and industry codes of practice.
Context of and specific resources for assessment	Assessment must ensure: • activities are related to an international onshore education context and a specific education sector • access to international education-related workplace information and data.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports on how the candidate developed an onshore educational program • analysis of projects, response to a problem-based case study-related task, completed records and reports developed by the candidate • review of opportunities and threats identified as likely to influence international onshore education initiatives • oral or written questioning to assess knowledge of factors influencing strategic directions in international onshore education • review of marketing strategies and implementation plan developed for international onshore education

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EVIDENCE GUIDE	
	initiatives.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • with other units in the qualification in which this unit is packaged.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

International onshore education initiatives may include:	• exchanges and study abroad programs including postgraduate and other academic and work placements
	• onshore education programs and projects in:
	  • primary and secondary schools
	  • English language and preparatory schools
	  • higher education organisations
	  • vocational education and training organisations
	• onshore study tours

Influences may include:	• competitors • costs • cross credit arrangements • current stakeholders • demand for skills and knowledge • economic growth trends • international trade agreements and liberalisation • language • local capacity • local policies • political

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RANGE STATEMENT	
	• quality • social
Opportunities and threats may include:	• economic • educational • financial • political • public health • resourcing

Relevant legislation, ***regulations and codes*** may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:
	  • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance
	  • business compliance relevant to work roles
	  • Education Services for Overseas Students (ESOS) Act 2000, and subsequent amendments and related legislation
	  • employment, education and training - relevant to onshore and offshore provision
	  • environmental issues
	  • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT)
	  • National Code of Practice for Registration Authorities and Providers of International Education and Training
	  • occupational health and safety
	  • privacy and confidentiality
	  • Transnational Quality Strategy (2005)
	  • workplace employment practices and industrial relations
	• National ELT Accreditation Scheme (NEAS) standards for young learners and for teaching English language to international students

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RANGE STATEMENT	
	• quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices
Required resources may include:	• communications and information technology
Procedures to deal with learning and cultural differences may include:	• clear guidance for staff about cross-cultural issues • cultural and academic induction programs • language support • mentoring and buddy systems • pre-departure information • social and cultural events • staff cross-cultural training, coaching and mentoring • study skills support
Pastoral care needs may include:	• academic • accommodation • cultural and religious • financial • health • language and learning • social

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

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Co-requisite units

Co-requisite units		

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BSBEDU703A Establish transnational offshore education initiatives

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop, implement and evaluate transnational offshore education initiatives in one or more education sectors and within relevant international, cultural, legal and political contexts. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit relates to administrators with managerial responsibility who are required to establish and evaluate transnational offshore education initiatives. They will be managing education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Propose strategic directions for transnational offshore education initiatives	1.1. Review the diversity and economic significance of Australian ***transnational offshore education initiatives*** 1.2. Distinguish trends in the activities of competitors 1.3. Analyse ***factors impacting positively and negatively*** on transnational offshore education initiatives 1.4. Identify ***innovative possibilities*** in offshore education for Australian entrepreneurs
2. Develop marketing strategies appropriate for transnational offshore education initiatives	2.1. Determine roles and responsibilities of participants in international bidding processes 2.2. Develop protocols for effective communication with relevant agencies and bureaucracies 2.3. Investigate curriculum and qualification issues for potential clients 2.4. Review Australian education marketing strengths in

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ELEMENT	PERFORMANCE CRITERIA
	relation to specific customer focus 2.5. Determine ***appropriate product development and customisation*** to address specific transnational offshore education opportunities 2.6. Develop ***appropriate documentation*** relating to an offshore education initiative
3. Develop strategies to deal with legal and financial issues associated with transnational offshore education initiatives	3.1. Compare a range of funding models, networks and partnerships that support offshore education ventures 3.2. Determine the tax implications associated with transnational offshore education projects 3.3. Develop a process for costing offshore initiatives 3.4. Determine the ***impact*** of local infrastructures and bureaucratic practices on transnational offshore education initiatives 3.5. Develop procedures to comply with and take account of, ***Australian and local legal and regulatory requirements*** that could affect transnational offshore education projects
4. Develop an implementation plan for transnational offshore education initiatives	4.1. Identify business imperatives and best practice for transnational offshore education initiatives 4.2. Determine the resources and infrastructure required by transnational offshore education initiative 4.3. Develop ***communication guidelines*** for transnational offshore education personnel 4.4. Develop procedures to select and manage local and expatriate personnel 4.5. Determine appropriate implementation strategies, contingency plans, risk assessment strategies and quality management procedures for transnational offshore education initiatives
5. Develop evaluation procedures for transnational offshore education initiatives	5.1. Identify key areas of activity to be monitored and evaluated 5.2. Determine an ***appropriate evaluation methodology*** 5.3. Determine sources and type of information to be used in evaluating the initiative 5.4. Develop appropriate ***tools and processes to gather and analyse information*** 5.5. Identify possible actions that effectively respond to an evaluation process and implement within organisational guidelines

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to interact appropriately with students, co-workers, partners and other stakeholders
- initiative and enterprise skills to identify innovative approaches to transnational offshore education challenges
- learning skills to familiarise self and colleagues with needs of a range of country and cultural contexts
- literacy skills to record and report information accurately
- numeracy skills to understand and analyse financial and budgetary requirements of transnational offshore education programs and projects
- planning and organising skills to plan and deliver transnational offshore education program support
- problem-solving skills to resolve conflict and to negotiate outcomes
- self-management skills to mange own work and performance
- teamwork skills to work effectively with groups and teams in offshore settings
- technology skills to use the internet to research relevant information and to communicate internationally.

Required knowledge

- best practice in transnational offshore education management
- evaluation methodologies and tools
- factors influencing strategic directions in transnational offshore education
- marketing processes and strategies for transnational offshore education initiatives
- relevant requirements of Australian and offshore legislation and regulations; organisational policies, procedures and guidelines; standards, codes and industry codes of practice; duty of care and visa requirements.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying, researching, reviewing and evaluating transnational offshore education initiatives including marketing and meeting, regulatory and financial requirements • knowledge of relevant requirements of Australian and offshore legislation and regulations; organisational policies, procedures and guidelines; standards, codes and industry codes of practice; duty of care and visa requirements.
Context of and specific resources for assessment	Assessment must ensure: • activities are related to a transnational offshore education context • access to a range of practical exercises and other practical and knowledge assessments.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports • analysis of projects, responses to a problem-based case study-related task, completed records and reports developed by the candidate • review of marketing strategies and implementation plan developed for transnational offshore education initiatives • oral or written questioning to assess knowledge of factors influencing strategic directions in transnational offshore education • review of evaluation methodology.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • with other units in the qualification in which this unit is packaged.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Transnational offshore education initiatives may include:	• AUSAID and Australian government department educational programs • industry placements • licensing arrangements with overseas institutions • offshore campuses • partnerships • program delivery • projects • study abroad programs • study tours • twinning arrangements
Factors impacting positively and negatively on transnational offshore education initiatives may include:	• competition • economic and financial factors • language • long-term outlook • political and social factors • stakeholders
Innovative possibilities may include:	• new arrangements • new clients • new pedagogical and curriculum-related concepts • new programs and projects
Appropriate product development and customisation may include addressing:	• cultural factors • language requirements • pedagogical and curriculum-related requirements • pricing requirements
Appropriate documentation may include:	• concept proposal • expression of interest • Memorandum of Agreement • Memorandum of Understanding • tender

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RANGE STATEMENT	
Impact of local infrastructures may include:	• communications and information technologies

Australian and local legal and regulatory requirements may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:
	  • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance
	  • business compliance relevant to work roles
	  • Education Services for Overseas Students (ESOS) Act 2000, subsequent amendments and related legislation
	  • employment, education and training - relevant to onshore and offshore provision
	  • environmental issues
	  • immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT)
	  • National Code of Practice for Registration Authorities and Providers of International Education and Training
	  • occupational health and safety
	  • privacy and confidentiality
	  • Transnational Quality Strategy (2005)
	  • workplace employment practices and industrial relations
	• legislation, regulations, codes, standards and protocols that apply in offshore location
	• National ELT Accreditation Scheme (NEAS) standards for young learners and for teaching English language to international students
	• quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices

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RANGE STATEMENT	
Communication guidelines may include:	• reference to local protocols and cross-cultural communication and issues
Appropriate evaluation methodology may include:	• custom-designed program-specific methodologies • standardised in-house evaluation methodologies
Tools and processes to gather and analyse information may include:	• interviews • online feedback forms • questionnaires • structured focus group tools • surveys

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEDU704A Conduct applied international education research

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to conduct applied research in the context of managing international education programs and activities in an international education organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit relates to administrators with managerial responsibility who are required to conduct applied research in relation to international education programs and activities. They will be managing education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Prepare a project brief relating to researching an aspect of international education	1.1. Identify purpose of ***applied research*** to be conducted 1.2. Prepare a rationale for research and put forward hypotheses to be tested 1.3. Identify and report on research background and ***research procedures and methodology*** to be used 1.4. Define activities to be undertaken in conducting the research, timeframe, resources required and expected business outcomes 1.5. Develop process and criteria to evaluate achievement of the outcomes
2. Undertake applied research	2.1. Outline methodology, procedure, research tools, variables and any ***legal or ethical considerations*** for the project 2.2. Manage and conduct research activities using effective techniques for project management, implementation and data collection

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Collect and analyse data, and record appropriate project activities
3. Prepare and present appropriate documentation on research outcomes	3.1. Prepare ***appropriate documentation*** on research outcomes that is original, thorough, well reasoned, clear and succinct 3.2. Present research outcomes and where relevant, recommendations for further research, action or implementation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to prepare reports; to conduct surveys; to explain research objectives, processes and outcomes clearly to others
- initiative and enterprise skills to identify innovative applications of research in an international education context
- learning skills to select appropriate research methodology for purpose
- literacy skills to prepare academic research reports in plain English
- numeracy skills to carry out statistical analysis as required by research activities
- planning and organising skills to plan and conduct research
- problem-solving skills to pose and solve research problem/s
- self-management skills to independently carry out research
- teamwork skills to collaborate with others as required in the research process
- technology skills to access resources using internet and library catalogues.

Required knowledge

- application of a range of relevant research methods
- correct use of academic referencing and citation protocols
- relevant legal, ethical and organisational research requirements.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • conducting original applied research in an international education organisation • knowledge of relevant legal, ethical and organisational research requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to international education-related data • research activities are related to an international education context and a specific education sector.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate performance in researching issues in international education • evaluation of supervisor's reports on how the candidate conducted the research • observation and evaluation of work role-related oral research presentations • analysis of research records and reports developed by the candidate • review of rationale prepared for research and hypotheses put forward to be tested • review of data analysis and recorded project activities • evaluation of documentation prepared on research outcomes • oral or written questioning to assess knowledge of relevant research methods.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • with other units in the qualification in which this unit is packaged.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Applied research includes:	• research conducted for the primary purpose of solving an immediate, practical problem

Research procedures and methodology may include:	• action plan including time line
	• considering a range of possible methodologies and strategies such as:
	  • desk-based research
	  • ethnographic research
	  • interviews
	  • literature review
	  • questionnaires
	  • surveys

Legal or ethical considerations may include:	• awareness of power relationships • commercial confidentiality • intellectual property • organisational policies • privacy and confidentiality
Appropriate documentation may include:	• discussion of any limitations of methodology, data and analysis or process • presentation of the outcomes • relevant appendices • research report • support for the activity process or research hypothesis

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Administration - Educational Administration

Co-requisite units

Co-requisite units		

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BSBEMS401B Develop and implement business development strategies to expand client base

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and implement prospecting strategies to expand the client base of organisations or enterprises seeking to employ individuals. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in either a public or private employment services agency to expand the organisation's client base as a senior consultant or manager.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop strategies to identify potential clients	1.1. Undertake research to identify potential ***clients*** 1.2. Develop ***marketing*** and ***promotional plans*** to target potential clients 1.3. Use ***prospecting methods*** to target potential clients 1.4. Review and evaluate strategies for effectiveness
2. Initiate relationship with potential clients	2.1. Develop ***communication strategies*** to effectively liaise with potential clients 2.2. Identify and analyse client business requirements 2.3. Discuss and negotiate client business requirements 2.4. Prepare a tender and proposal to meet negotiated client business requirements 2.5. Present organisation's proposal to the client
3. Manage client relationship	3.1. Make follow-up contact with the client 3.2. Negotiate business requirements to ensure client satisfaction with the service to be provided 3.3. Adapt proposal to client as required 3.4. Develop contract with client
4. Utilise networks to expand client base	4.1. Review and assess established ***networks*** for effectiveness in assisting to identify potential clients 4.2. Use appropriate communication strategies to utilise networks to identify potential clients 4.3. Use networks to identify and build relationships with

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ELEMENT	PERFORMANCE CRITERIA
	potential clients 4.4. Identify benefits of networks and other relationships in expanding the client base

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to establish and maintain effective business relationships with potential and current clients • consultative and negotiation skills to persuade clients to use the services provided by the organisation • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • presentation skills to promote organisation's services to potential and current clients • sales and marketing skills to promote organisation's services and to generate leads.
Required knowledge

• economic, social and industry trends affecting employment levels
• key provisions of relevant legislation from all forms of government that affects business operations, codes of practice and national standards, such as:
  • occupational health and safety (OHS)
  • equal employment opportunity (EEO)
  • racial discrimination
  • industrial relations
  • privacy laws
  • freedom of information legislation
  • disability discrimination legislation
• methods to attract new clients
• principles of equal opportunity, equity, diversity and anti-discrimination
• range of organisational products and services
• relevant state/territory and federal industrial relations systems.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • strategies developed for gaining new clients • establishment and maintenance of relationships with clients • expansion of client base using client network/s • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of workplace documents used in employment services agencies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations to potential or existing clients • oral or written questioning • review of marketing and promotional plans developed to target potential clients • review of communication strategies developed to effectively liaise with potential clients.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workforce development units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Clients may include:	• organisations or enterprises seeking to employ individuals through an employment services agency
Marketing plans may include:	• business-to-business marketing • direct marketing • ideas marketing • marketing of goods • services marketing • telemarketing
Promotion plans may include:	• impersonal promotion such as advertising and sales promotion • personal promotion such as face-to-face selling
Prospecting methods may include:	• brokers • cold canvassing • direct mail • internet and databases • intra-organisation leads and referrals • media advertising and telemarketing • networks • newspapers, journals and magazines • spotters and brokers
Communication strategies may include:	• electronic • face-to-face • telephone • written
Networks may include:	• business • formal • groups • informal • organisations • personal • professional

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Recruitment and Employment Services

Co-requisite units

Co-requisite units		

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BSBEMS402B Develop and implement strategies to source and assess candidates

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and implement strategies to source candidates and to assess their suitability for available positions. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in an employment services agency to source and assess candidates.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop strategies to source candidates	1.1. Undertake research to identify potential ***candidate channels*** 1.2. Identify a range of ***strategies*** to assist in sourcing candidates 1.3. Review and evaluate strategies for effectiveness 1.4. Develop ***advertisement copy*** to align with ***client*** requirements, job specifications and place accordingly to attract candidates
2. Screen and interview potential candidates	2.1. Undergo preliminary ***screening*** with candidates in a fair and equitable manner, in compliance with relevant legislation 2.2. Organise and conduct interviews and employment appraisal assessments in accordance with organisational policy and best practice 2.3. Undertake ***general assessment of raw skills*** as required, depending on the position 2.4. Obtain additional information from candidates as required
3. Assess and select candidates	3.1. Conduct assessment and selection process in accordance with organisational policy and legislative requirements, and in consultation with the client 3.2. Judge information obtained from each candidate against specified selection criteria and note any

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ELEMENT	PERFORMANCE CRITERIA
	additional influencing factors 3.3. Align candidate suitability to specific client requirements and job specifications, in consultation with the client 3.4. Prepare selection recommendations for the client and document in accordance with organisational procedures
4. Manage candidate outcomes	4.1. Inform all candidates of selection decisions in a timely manner 4.2. Provide feedback to unsuccessful candidates 4.3. Provide successful candidate with briefing and coaching for interview with the client 4.4. Negotiate placements with the candidate and the client

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to determine fit between candidate abilities and client organisational requirements
- communication skills to establish and maintain effective business relationships with potential and current clients, to interview candidates and to provide feedback
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- information management skills to analyse and evaluate candidate information obtained from résumés, letters, references, interviews and aptitude assessments
- presentation skills to promote organisation's services to potential and current clients and candidates
- research and data collection skills to check candidate information for detail and accuracy
- sales and marketing skills to present organisation's services to prospective and existing clients .

Required knowledge

- economic, social and industry trends affecting employment levels
- key provisions of relevant legislation from all forms of government that affects

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REQUIRED SKILLS AND KNOWLEDGE
business operations, codes of practice and national standards, such as: • occupational health and safety (OHS) • equal employment opportunity (EEO) • racial discrimination • industrial relations • privacy • freedom of information • disability discrimination • range of interview techniques and recruitment sourcing methods • range of organisational products and services • relevant state/territory and federal industrial relations systems.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of strategies developed for sourcing candidates • application of screening and interviewing candidates for a position • assessment of a candidate's skills • placement of a candidate in employment with a client in a position with a client outcome • notices to unsuccessful candidates • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to workplace documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples

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EVIDENCE GUIDE	
	are appropriate for this unit: • assessment of written reports summarising results of candidate skills assessment and selection outcomes • observation of client screening and interview techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors, managers, clients or candidates.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other human resources units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Candidate channels may include:	• association and industry networks • career or industry expositions • equity group community organisations • individual networks • internet • media advertising • organisational networks • private and public schools • training organisations
Strategies may include:	• brokers • career markets

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RANGE STATEMENT	
	• databases • direct mail • internet • intra-organisation leads • journals • magazines • media advertising • newspapers • referrals • spotters • television or cinema advertising • use of industry or other networks
Advertisement copy includes:	• internet copy • media advertising copy
Clients may include:	• organisations or enterprises seeking to employee individuals through an employment services agency
Screening may include:	• language, literacy and numeracy check • reference check • rÃ©sumÃ© check • specific assessments undertaken

General assessment of raw skills may include:	• vocationally specific assessments such as:
	  • MYOB
	  • speed and accuracy tests

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Recruitment and Employment Services

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Co-requisite units

Co-requisite units		

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BSBEMS403B Develop and provide employment management services to candidates

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide employment services to candidates that assist in the retention and management of candidates by the organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in either a public or private employment services agency to provide candidates with services that promote their retention with the agency and employment management services.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop strategies for the retention of candidates	1.1. Analyse current ***candidate information*** 1.2. Identify ***candidate requirements*** 1.3. Identify a range of ***strategies*** to meet candidate requirements 1.4. Evaluate and assess products and services for candidates 1.5. Establish and implement methods of monitoring candidate retention
2. Provide advice and support to candidates	2.1. Provide services including résumé counselling and preparation 2.2. Provide career advice and counselling to candidates 2.3. Undertake candidate induction in accordance with ***client*** requirements, organisational policy and OHS compliance requirements 2.4. Provide advice and information on legislative industrial relations matters, OHS and employment issues to candidates
3. Provide training solutions to candidates	3.1. Identify and document candidates' training needs, including OHS 3.2. Undertake research to identify suitable training programs available to address candidates' identified training need 3.3. Provide advice to candidates on training options

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ELEMENT	PERFORMANCE CRITERIA
	available 3.4. Provide relevant internal training to meet candidate requirements if required, in accordance with organisational policies 3.5. Access relevant external training to meet candidate requirements if required, in accordance with organisational policies 3.6. Review implementation of client training plan with client to ensure needs are met
4. Develop strategies for the ongoing management of candidates	4.1. Establish monitoring strategies to determine issues in service delivery to candidates 4.2. Provide ***post placement support*** to candidates 4.3. Develop strategies to evaluate and assess the effectiveness of the employment management services 4.4. Develop and document recommendations to improve management services 4.5. Modify and/or expand management services as appropriate to incorporate recommendations

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to facilitate individual and group discussion and to prepare résumés • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • interpersonal skills to counsel candidates using the employment services agency • presentation and training skills to provide training for candidates • research and data collection skills to check candidate information for detail and accuracy.
Required knowledge
• key provisions of relevant legislation from all forms of government that affects business operations, codes of practice and national standards, such as: • disability discrimination

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REQUIRED SKILLS AND KNOWLEDGE
• equal employment opportunity (EEO) • freedom of information legislation • industrial relations • occupational health and safety (OHS) • privacy legislation • racial discrimination • range of organisational products and services • range of training options and solutions • range of techniques used in training, coaching and mentoring • relevant state/territory and federal industrial relations systems.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • strategies developed to retain candidates • advice and support to candidates about employment • provision of appropriate training to candidates which promotes their chances of employment • development and implementation of strategies to improve services to candidates • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to workplace documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports summarising strategies to retain candidates, training evaluations, and/or

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EVIDENCE GUIDE	
	service improvement • observation of training sessions delivered to candidates • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors, managers, clients or candidates.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other human resources units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Candidates may include:	• someone seeking temporary or permanent employment • someone seeking full-time, part-time or casual employment • apprentices, trainees and others outside such schemes • people from equity groups or with special needs
Candidate information may include:	• career preferences and pathways • current retention rate • demographic data
Candidate requirements may include:	• information and advice required • preferred communication channels

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RANGE STATEMENT	
	• preferred training style • types of services required
Strategies may include:	• encouraging membership of interest groups • loyalty programs • marketing and promotional strategies • mentoring and coaching • negotiating reasonable adjustments • networking events • using appropriate communication channels
Clients may include:	• organisations or enterprises seeking to employ individuals through an employment services agency
Post placement support may include:	• career progression advice • further training and development advice • referrals to new employment opportunities • resolving issues related to employment gained • updating rÃ©sumÃ©

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Recruitment and Employment Services

Co-requisite units

Co-requisite units		

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BSBEMS404B Manage the recruitment process for client organisations

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and implement strategies to source and assess candidates for placement purposes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in either a public or private employment services agency to undertake and manage the recruitment process for client organisations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Provide advice on recruitment strategy to client	1.1. Provide advice and information to ***client*** on workforce planning and ***performance management*** systems and issues 1.2. Provide advice and information to client to assist in developing and/or evaluating a ***recruitment strategy*** and processes 1.3. Identify and determine effective and accurate ***performance indicators*** 1.4. Discuss and agree with client, recommendations for necessary ***assessments and profiling*** 1.5. Identify and analyse ***performance gaps*** as part of workforce planning 1.6. Evaluate for continuous improvement forms, procedures and induction processes
2. Determine job specifications with client	2.1. Undertake job analysis with client to determine needs and requirements for recruitment, in line with organisational recruitment strategy 2.2. Provide advice to client on issues such as salary and conditions 2.3. Write clear and concise ***specifications*** which accurately reflect the job role within the client's organisation, and comply with relevant legal requirements and organisational format 2.4. Confirm specifications with appropriate personnel

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ELEMENT	PERFORMANCE CRITERIA
	prior to undertaking recruitment
3. Manage recruitment process	3.1. Develop a selection plan and criteria based on the job specification, performance gaps and organisational needs, in consultation with the client 3.2. Write and place recruitment advertisements in relevant ***media*** in accordance with job specifications and organisational policy 3.3. Employ ***strategies*** to source potential candidates 3.4. Organise and conduct job interviews and employment appraisals in accordance with organisational policy and legislative requirements
4. Assess and select candidates	4.1. Judge information obtained from each candidate against specified selection criteria and note any additional influencing factors 4.2. Conduct assessment and selection process in accordance with organisational policy and legislative requirements 4.3. Shortlist suitable candidates for client interview
5. Refer candidates and complete placement process	5.1. Recommend candidates best suited to selection criteria to client for interview, and create and forward candidate profiles to client 5.2. Provide advice and support to candidates with résumé preparation, interview preparation and presentation to the client 5.3. Inform all candidates promptly and accurately of selection decisions 5.4. Conduct job offer to successful candidate 5.5. Complete placement follow-up

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analysis and evaluation of information such as résumés, letters, references, interviews and aptitude tests against job selection criteria • communication and interpersonal skills to counsel candidates about available,

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REQUIRED SKILLS AND KNOWLEDGE
suitable or possible work opportunities and skill development options • communication skills to listen to candidates and clients; to provide advice and present solutions; and to write clear, accurate position descriptions • information management skills to check information for detail and accuracy • interpersonal skills to establish and maintain relationships with candidates and clients • organisational and time management skills to work quickly and effectively.
Required knowledge

• key provisions of relevant legislation from all forms of government that affects business operations, codes of practice and national standards, such as:
  • disability discrimination
  • equal employment opportunity (EEO)
  • freedom of information
  • industrial relations
  • occupational health and safety (OHS)
  • privacy
  • racial discrimination
• range of organisational products and services
• range of recruitment sourcing methods, strategies and techniques
• range of workforce planning and performance management systems
• techniques to assess the competency of individuals.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • advice provided to clients about recruitment strategy to client • job specifications and selection plandeveloped • records of assessment and selection of candidates for a specific position • records of recommendations for candidates best

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EVIDENCE GUIDE	
	suited to the position • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to workplace documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written recruitment strategies, job specifications, selection plans and recommendations made to clients • observation of assessments conducted on candidates • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning • review of testimony from team members, colleagues, supervisors, managers, clients or candidates.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other human resources units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Clients may include:	• organisations or enterprises seeking to employ individuals through an employment services agency

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RANGE STATEMENT	
Performance management may include:	• systems developed for the appraisal and management of employee performance in the workplace including development, planning and salary reviews

Recruitment strategy may include:	• system and/or policies and procedures developed to determine appropriate action in the recruitment and selection of personnel such as:
	  • application process
	  • competency profiling
	  • job analysis, description and evaluation
	  • psychometric assessment
	  • recruitment advertising
	  • use of external agencies

Performance indicators may include:	• level of performance sought, expressed either quantitatively or qualitatively • measures developed to gauge performance outcomes against targets

Assessments and profiling may include:	• behavioural profiling
	• literacy and numeracy
	• raw material assessments
	• specific aptitudes such as:
	  • mechanical, reasoning
	  • problem-solving
	  • typing
	  • use of software applications

Performance gaps may include:	• situations where outcomes are less than those stated in the strategic objectives (including the lack of employees with the required level of performance to undertake the tasks)
Specifications may include:	• competencies required • job title and purpose of position • personal attributes • qualifications • skills and knowledge necessary
Media may include:	• internet • local, national and global • magazines and journals • traditional media such as newspapers

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RANGE STATEMENT	
Strategies may include:	• brokers • databases • direct mail • internet • intra-organisation leads • journals • magazines • media advertising • networks • newspapers • referrals • spotters

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Recruitment and Employment Services

Co-requisite units

Co-requisite units		

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BSBFIA301A Maintain financial records

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to maintain financial records for a business. It includes maintaining daily financial records such as reconciling debtors' and creditors' systems, preparing and maintaining a general ledger, and preparing a trial balance. It also includes activities associated with monitoring cash control for accounting purposes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge of financial records to provide technical advice and support to a team.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Maintain daily financial records	1.1. Correctly maintain daily financial records and in accordance with ***organisational requirements*** for accounting purposes 1.2. Identify and rectify or refer ***discrepancies*** or errors in ***documentation*** or transactions to ***designated persons*** in accordance with organisational requirements 1.3. Accurately credit and debit transactions and promptly enter into ***journals*** in accordance with organisational requirements
2. Maintain general ledger	2.1. Maintain general ledger in accordance with organisational requirements 2.2. Post ***transactions*** into general ledger in accordance with organisational reporting requirements 2.3. ***Reconcile systems for accounts payable and receivable*** with general ledger 2.4. Accurately prepare trial balance from general ledger in accordance with organisational requirements
3. Monitor cash control	3.1. Ensure cash flow is accurately accounted for in accordance with organisational requirements 3.2. Make and receive ***payments*** in accordance with

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ELEMENT	PERFORMANCE CRITERIA
	organisational requirements 3.3. Collect or follow-up outstanding accounts within designated time lines 3.4. Check payment documentation for accuracy of information and despatch to creditors within ***designated time line***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to identify financial information; to read and understand the organisation's accounting procedures; and to edit and proofread documents to ensure conformity and consistency of information
- communication skills to clarify information and to refer errors or discrepancies to appropriate people
- numeracy skills to read and interpret financial data and to prepare cash analysis sheets
- problem-solving skills to reconcile figures.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - financial legislation
  - occupational health and safety (OHS)
- organisational policies and procedures relating to maintaining financial records
- definition of credits/creditors and debits/debtors
- principles of double entry bookkeeping and accrual accounting
- methods of presenting financial data.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying and responding to discrepancies and errors • transferring and recording financial data accurately • reconciling expenditures and revenue • knowledge of organisational policies and procedures relating to maintaining financial records.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of source documents relating to financial record keeping.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of identification and rectification or referral of discrepancies or errors in documentation or transactions • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of financial record keeping • examples of financial documentation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • general administration units • other financial administration units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Organisational requirements may include:	• designated time lines • guidelines for reconciling journals • legal and organisational policies, guidelines and requirements • OHS policies, procedures and programs • procedures for totalling adjusted journals • quality assurance and/or procedures manuals • resolution procedures • security procedures
Discrepancies may relate to:	• bank charges • dishonoured cheques • errors in transposing between source documents and journals • interest
Documentation may include:	• purchase credit notes • purchase invoices • sales credit notes • sales invoices
Designated persons may include:	• bank • line management • organisation's authorisations department • statutory body • supervisor
Journals may include:	• cash payments • cash receipts • purchases and purchase returns • sales and sales returns
Transactions may include:	• commencing business entries • correction of posting errors • interest expense

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RANGE STATEMENT	
	• interest receivable • non-cash transactions (e.g. writing-off depreciation, stock losses) • purchase of a fixed asset on credit • sale of a fixed asset on credit • withdrawal of stock/assets by owner • write-off a bad debt
Reconciling systems for accounts payable and receivable may include:	• checking accuracy of creditor account balances (e.g. cash payments journal, purchases journal, purchases returns journal, general journal) • checking accuracy of debtor account balances (e.g. cash receipts journal, sales return journal, general journal) • checking cash payments and receipt journals against bank statement • checking the total of the creditor's schedule equals the balance of the creditor's control account • checking the total of the debtor's schedule equals the balance of the debtor's control account
Payments may include:	• cash • cheque • credit card • direct debit
Designated time lines may include:	• by month end • monthly • within agreed period • within organisational deadline

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Finance - Financial Administration

Co-requisite units

Co-requisite units		

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BSBFIA302A Process payroll

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to process payroll from provided data using manual and computerised payroll systems. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who are responsible for payroll functions within an organisation. They may work as individuals providing administrative support within an enterprise, or may be other members of staff who have been delegated payroll responsibilities.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Record payroll data	1.1. Check payroll data and clarify discrepancies with ***designated persons*** 1.2. Enter employee ***pay period details*** and any ***deductions and allowances*** in ***payroll system*** in accordance with ***source documents*** 1.3. Calculate payment due to individual employees to reflect standard pay and ***variations*** in accordance with employee source data
2. Prepare payroll	2.1. ***Prepare payroll*** within designated time lines in accordance with organisational policy and procedures 2.2. Reconcile total wages for pay period, check or correct irregularities or refer to designated persons for resolution 2.3. Make arrangements for payment in accordance with organisational and individual requirements 2.4. Obtain authorisation of payroll and individual pay advice in accordance with organisational requirements 2.5. Produce, check and store ***payroll records*** in accordance with organisational policy and security procedures 2.6. Follow security procedures for processing payroll and for maintaining payroll records

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ELEMENT	PERFORMANCE CRITERIA
3. Handle payroll enquiries	3.1. Respond to payroll ***enquiries*** in accordance with organisational and ***legislative requirements***
	3.2. Provide information in accordance with organisational and legislative requirements
	3.3. Ensure all enquiries outside area of responsibility and knowledge are referred to designated persons for resolution
	3.4. Complete additional information or follow-up action within designated time lines in accordance with organisational policy and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to:
  - read and understand organisation's financial policies and procedures, and any procedures based on legislative requirements
  - write cheque or salary authorisations
  - prepare pay advice slips
  - maintain records
- numeracy skills to perform calculations and to reconcile figures
- problem-solving skills to reconcile figures and to resolve employee enquiries within scope of own responsibility.

Required knowledge

- key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - financial legislation
  - privacy laws
  - occupational health and safety

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REQUIRED SKILLS AND KNOWLEDGE
• organisational policy and procedures • types of payroll systems.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • performing payroll calculations • applying knowledge of organisational guidelines relating to security and confidentiality of information.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to computer equipment, relevant software and payroll data (samples or actual).
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • analysis of responses to case studies and scenarios • demonstration of techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other financial administration units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Designated persons may include:	• immediate supervisor • those who have the authority to approve payroll decisions
Pay period details may include:	• bonus • casual wage • commission • contract • piecework • salary • wage
Deductions and allowances may include:	• car allowance • health insurance • income tax • meal allowance • superannuation contributions • travel allowance • union dues
Payroll system may include:	• manual • computerised
Source documents may include:	• employee earnings and payroll register • employee records or history • employee timesheets
Variations may include:	• holiday loading • long service leave • overtime • paid leave • rates of pay • sick leave • taxation • unpaid leave

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RANGE STATEMENT	
Preparing payroll may include:	• calculation of gross pay • cash analysis • electronic funds transfer • net pay • preparing cheques • preparing pay advice slips • taxation and other deductions
Payroll records may include:	• cash analysis sheets • electronic funds transfer • employee summary report • end of month reports • end of year reports • group certificates • pay advice slips • taxation reports
Enquiries may include:	• email • face-to-face • fax • telephone
Legislative requirements may include:	• Australian Tax Office regulations e.g. Australian Business Number, Employment Declaration Forms • confidentiality and security of records • Higher Education Contribution Scheme (HECS) • Higher Education Loan Programme (HELP) • Medicare levy • PAYE tax • payroll tax

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Finance - Financial Administration

Co-requisite units

Co-requisite units		

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BSBFIA303A Process accounts payable and receivable

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to maintain accounts payable and accounts receivable records, including processing payments to creditors and handling overdue accounts receivable. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments supporting the accounting functions and aspects of an enterprise. They may provide administrative support within an enterprise, or may be members of staff who have been delegated accounting responsibilities.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Maintain financial journal systems	1.1. Check ***source documents*** for accuracy and appropriate authorisation 1.2. Refer errors and discrepancies in source documents for resolution, in accordance with organisational policy and procedures 1.3. Enter ***transactions*** into cash and credit ***journal system*** in accordance with organisational policy and procedures, and ***relevant legislation and compliance requirements*** 1.4. Total credit journals in accordance with organisational policy and procedures
2. Prepare bank reconciliations	2.1. Check cash journals against bank statements to identify differences 2.2. Update cash journals with relevant data from bank statement/s 2.3. Identify ***discrepancies*** and refer to appropriate staff member, organisation or agency 2.4. Total cash journals in accordance with organisational policy and procedures 2.5. Prepare regular reconciliation reports within designated time lines

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ELEMENT	PERFORMANCE CRITERIA
3. Maintain accounts payable and accounts receivable systems	3.1. Enter transactions into individual ***accounts payable and accounts receivable***, in accordance with organisational policy and procedures, and accounting requirements 3.2. Prepare schedules of accounts payable and accounts receivable for reconciliation purposes, in accordance with organisational requirements 3.3. Reconcile schedules accounts payable and accounts receivable with ***journal data*** or general ledger, in accordance with organisational requirements
4. Process payments for accounts payable	4.1. Reconcile accounts payable statements with accounting records, in accordance with organisational policy and procedures 4.2. ***Check payment documentation*** for accuracy of information and discrepancies and rectify errors, in accordance with organisational requirements
5. Prepare statements for accounts receivable	5.1. Produce and check ***accounts receivable statements*** for accuracy of content in accordance with organisational policy and procedures 5.2. Rectify discrepancies and statements despatched within designated time lines
6. Follow up outstanding accounts	6.1. Maintain accounts receivable ledger system, in accordance with organisational requirements, to reflect current credit situation 6.2. Conduct aged analysis of accounts receivable to identify outstanding accounts and to determine collection procedures, in accordance with organisational requirements 6.3. Report or follow-up outstanding accounts in accordance with organisational policy and procedures 6.4. Monitor and review ***credit terms*** in accordance with credit policy and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills

• literacy skills to read and understand financial procedures
• numeracy skills to:
  • use knowledge of mathematical concepts
  • interpret, compare and calculate with whole numbers and money
  • use decimal fractions and percentages
• problem-solving skills to use approximation to check for discrepancies and ensure calculations are correct.

Required knowledge

• key provisions of relevant legislation and regulations from all forms of government, standards and codes that may affect aspects of business operations, such as:
  • Australian Taxation Office regulations
  • Goods and Services Tax (GST) regulations
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • finance legislation
  • privacy laws
  • occupational health and safety
• limit of scope of own responsibility
• organisational accounting systems and procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • maintaining journals and subsidiary ledger systems • accurately entering data into journal and subsidiary ledger system • reconciling subsidiary ledger system with journal or

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EVIDENCE GUIDE	
	general ledger data.

Context of and specific resources for assessment	Assessment must ensure:
	• access to an actual workplace or simulated environment
	• access to office equipment and resources, such as:
	  • calculator
	  • computer equipment and relevant software
	• access to examples of cash journals, credit journals, accounts payable and accounts receivable subsidiary legers
	• access to workplace reference materials such procedural manuals and company policy.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • oral or written questioning to assess knowledge of accounting procedures and techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other financial administration units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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RANGE STATEMENT	
Source documents may include:	• adjustment notes issued • adjustment notes received • cheque butts • credit notes issued • credit notes received • invoices issued • invoices received • receipts • tax invoices issued • tax invoices received
Transactions may include:	• capital contributions in cash by owner • cash purchases • cash sales • commission • credit purchases • credit sales • day-to-day expenses • electronic funds transfer • interest charges and bank fees • interest revenue • payments received from debtors • payments to creditors • petty cash transactions • purchases paid by cheque • returns • withdrawal of cash by owner
Journal system may include:	• cash payments journal • cash receipts journal • purchases journal • purchases returns journal • sales journal • sales returns journal
Systems may include:	• computerised • manual

Relevant legislation and compliance requirements may include:	• consumer:
	  • codes of practice
	  • Australian Consumer Credit Code
	  • privacy laws
	  • secrecy laws

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RANGE STATEMENT	

	• competition:
	  • Australian Competition and Consumer Commission (ACCC), National Competition Policy
	• prudential:
	  • commonwealth Bills of Exchange Act 1909
	  • commonwealth Cheques and Payment Orders Act 1986
	  • commonwealth Financial Transaction Reports Act 1988
	  • commonwealth Land Tax Assessment Act 2002
	  • commercial tenancies laws
	  • corporate law
	  • Credit Reference Association of Australia (CRAA)
	  • Electronic Funds Transfer (EFT) Code of Conduct
	  • Financial Institutions (FI) Code
	  • payroll tax assessment laws and regulations
	  • prescribed payments laws and regulations
	  • stamp duties laws
	  • taxation assessment laws

Discrepancies may include:	• bank charges • direct deposits • direct payments • dishonoured cheques • interest
Accounts payable and accounts receivable systems may include:	• accounts payable schedule • accounts payable subsidiary ledger • accounts receivable schedule • accounts receivable subsidiary ledger
Journal data may include:	• accounts payable data from cash payments journal • accounts receivable data from cash receipts journal • purchases journal total • purchases returns journal total • sales journal total • sales returns journal total

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RANGE STATEMENT	
Checking payment documentation may include:	• attachment of supporting invoices, statements • calculation of discount • cheque data • remittance advice data
Accounts receivable statements may include:	• any payments received allocated on an invoice by invoice basis • computerised system • discount policy • final balance with overdue details if appropriate • information about any sales, sales returns, credit, forward orders and payments, which have occurred throughout the month • manual system • month to which statement is applicable • name and address of client or accounts receivable • name and address of supplier • opening balance if applicable
Credit terms may include:	• arrangements for settlement • cancellation of agreed credit arrangements • cash on delivery

Unit Sector(s)

Unit sector	

Competency field

Competency field	Finance - Financial Administration

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBFIA304A Maintain a general ledger

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to maintain a general ledger within an organisation including processing journal entries and preparing a trial balance. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments with responsibility for simple accounting functions within an organisation. They may work as individuals providing administrative support within an enterprise, or may be other members of staff with delegated responsibilities relating to general ledger maintenance.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Process journal entries	1.1. Prepare ***general journal entries*** from ***source journals*** in accordance with accounting requirements, organisational policy, procedures and accounting standards 1.2. Post journal entries into ***general ledger system*** in accordance with organisational policy, procedures and accounting standards 1.3. ***Reconcile accounts payable and accounts receivable*** subsidiary ledger systems with general ledger 1.4. Ensure processing maintains the accounting equation and is completed within designated time lines
2. Prepare a trial balance	2.1. ***Prepare trial balance*** of general ledger system in accordance with organisational requirements and accounting standards, and ensure it is checked for accuracy 2.2. Identify and rectify irregularities or refer them for resolution when trial balance does not balance, in accordance with organisational policy and procedures

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• literacy skills to read and understand financial procedures
• numeracy skills to:
  • use knowledge of mathematical concepts
  • interpret, compare and calculate with whole numbers and money
  • use decimal fractions and percentages
• problem-solving skills to use approximation to check for discrepancies and ensure calculations are correct.

Required knowledge

• key provisions of relevant legislation and regulations from all forms of government, standards and codes that may affect aspects of business operations such as:
  • Australian Taxation Office regulations
  • Goods and Services Tax (GST) regulations
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • finance legislation
  • privacy laws
  • occupational health and safety
• limit of scope of own responsibility
• organisational accounting systems and procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential:

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EVIDENCE GUIDE	
competency in this unit	• accurately entering data • applying understanding of general journal entries and knowledge of the relationship between journals and general ledger • implementation of double-entry principles • systematic tracing of errors.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources, such as: • calculator • computer equipment and relevant software • examples of source journals.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • oral or written questioning to assess knowledge ofaccounting procedures and techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other financial administration units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and

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RANGE STATEMENT	
regional contexts) may also be included.	
General journal entries may include:	• bad debts written off • correction of posting errors • interest expense • interest receivable • opening entries • purchase of a non-current asset on credit • sale of a non-current asset on credit • transfer of funds between bank accounts • withdrawal of stock and assets by owner
Source journals for general ledger may include:	• cash payments journal • cash receipts journal • general journal • purchases journal • purchases returns journal • sales journal • sales return journal
General ledger system may include:	• computerised • manual
Reconciling accounts payable and accounts receivable may include:	• checking accuracy of accounts payable balances with general ledger control account • checking accuracy of accounts receivable balances with general ledger control account
Preparing trial balance may include:	• checking total debits equal total credits • listing ledger account balances from general ledger • tracing of errors

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Finance - Financial Administration

Co-requisite units

Co-requisite units		

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BSBFIA401A Prepare financial reports

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to record general journal adjustment entries and to prepare end of period financial reports. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who are responsible for preparing financial reports. They may work as individuals providing administrative support within an enterprise, or they might have responsibility for these tasks in relation to their own workgroup or role.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Maintain asset register	1.1. Prepare a register of property, plant and equipment from fixed asset transactions in accordance with organisational policy and procedures 1.2. Determine method of ***calculating depreciation*** in accordance with organisational requirements 1.3. Maintain asset register and associated depreciation schedule in accordance with organisational policy, procedures and accounting requirements
2. Record general journal entries for balance day adjustments	2.1. Record depreciation of non-current assets and disposal of fixed assets in accordance with organisational policy, procedures and accounting requirements 2.2. Adjust ***expense accounts*** and ***revenue accounts*** for ***prepayments and accruals*** 2.3. Record ***bad and doubtful debts*** in accordance with organisational policy, procedures and accounting requirements 2.4. Adjust ledger accounts for ***inventories***, if required, and transfer to ***final accounts***
3. Prepare final general ledger accounts	3.1. Enter general journal entries for balance day adjustments in general ledger system in accordance with organisational policy, procedures and accounting requirements 3.2. Post revenue and expense account balances to final

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ELEMENT	PERFORMANCE CRITERIA
	general ledger accounts system 3.3. Prepare final general ledger accounts to reflect gross and net profits for reporting period
4. Prepare end of period financial reports	4.1. Prepare ***revenue statement*** in accordance with organisational requirements to reflect operating profit for ***reporting period*** 4.2. Prepare ***balance sheet*** to reflect financial position of business at end of reporting period 4.3. Identify and correct, or refer errors for resolution in accordance with organisational policy and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to clarify reporting requirements and obtain required data
- literacy skills to:
  - identify financial information
  - follow the Australian Accounting and Auditing Standards
  - follow the organisation's accounting procedures
- numeracy skills to calculate percentages, addition and subtraction.

Required knowledge

- double-entry bookkeeping principles
- general journal and general ledger entries
- key provisions of relevant legislation and regulations from all forms of government, standards and codes that may affect aspects of business operations, such as:
  - Australian Taxation Office regulations
  - accounting and auditing standards
  - Goods and Services Tax (GST) regulations
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - finance legislation

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REQUIRED SKILLS AND KNOWLEDGE
• privacy laws • occupational health and safety • organisational accounting systems • organisational policies, procedures and accounting requirements.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • preparing financial reports • applying the Australian Accounting and Auditing Standards • applying double-entry principles.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources, such as: • calculator • computer equipment and relevant software • Australian Accounting and Auditing Standards • access to samples of financial data • access to workplace reference materials such procedural manuals and company policy.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • oral or written questioning to assess knowledge

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EVIDENCE GUIDE	
	ofaccounting procedures and techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other financial administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Calculating depreciation may include:	• reducing balance method • straight-line method
Expense accounts may include:	• distribution expenses • electricity • freight inward and outward • insurance • interest paid • rates • rent paid • telephone and fax • wages and salaries
Revenue accounts may include:	• commission received • interest received • rent received
Prepayments and accruals may include:	• accrued expenses • accrued revenue • prepaid expenses • prepaid revenue
Bad and doubtful debts may include:	• calculating provision for doubtful debts • writing off bad debts against provision for doubtful debts

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RANGE STATEMENT	
Inventories may include:	• goods for resale • stationery and other office supplies
Final accounts may include:	• profit and loss • trading
Revenue statement comprises:	• cost of goods sold if applicable • gross profit • operating net profit • unclassified adjusted expenses and revenue
Reporting period may include:	• as determined in organisational procedures • financial year
Balance sheet comprises:	• narrative or T format • unclassified assets and liabilities

Unit Sector(s)

Unit sector	

Competency field

Competency field	Finance - Financial Administration

Co-requisite units

Co-requisite units		

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BSBFIA402A Report on financial activity

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to report financial activity for business both in response to client requests and to meet statutory requirements such as the completion of statutory requirement reports. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of financial activities who contribute financial skills and knowledge to address reporting requirements of clients and legal authorities. They may have responsibility to provide guidance or to delegate aspects of these tasks to others.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Compile financial information and data	1.1. Collect, evaluate and code current ***financial data*** to ensure consistency, quality and accuracy in accordance with ***organisational requirements*** 1.2. Use ***conversion and consolidation procedures*** to compile analysis in accordance with organisational requirements 1.3. Make, record and disclose asset and liability valuations in accordance with organisational requirements 1.4. Ensure that ***discrepancies***, unusual features or queries are identified, resolved or referred to the appropriate authority
2. Prepare statutory requirement reports	2.1. Correctly record income and expenditure to ensure compliance with ***statutory requirements*** 2.2. Calculate liabilities for tax in accordance with current legislation and ***revenue gathering practices*** 2.3. Correctly identify relevant receipts, ***revenue documentation*** and payments 2.4. Ensure that statements and claims take full advantage of ***available benefits and allowances*** in accordance with statutory requirements 2.5. Submit statutory requirement reports to appropriate authorities within ***stated deadlines***

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ELEMENT	PERFORMANCE CRITERIA
3. Provide financial business recommendations	3.1. Ensure that ***recommendations*** are logically derived and supported by ***evidence*** in report 3.2. Provide recommendations to propose constructive actions to enhance the effectiveness and efficacy of functions and services 3.3. Ensure recommendations are concise and facilitate direction and control of organisation's operations 3.4. Identify and prioritise ***significant issues*** in statements including comparative financial performances for review and decision making 3.5. Ensure structure and ***format of reports*** are clear and conform to organisational and statutory requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to identify financial information and the organisation's accounting procedures, and to create financial reports
- problem-solving skills to deal with a defined range of predictable problems
- decision making skills to make routine decisions
- numeracy skills to calculate data and to reconcile figures.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - financial legislation
  - occupational health and safety (OHS)
- principles of double entry bookkeeping and accrual accounting
- techniques for forecasting and analysis
- Federal government taxes and charges

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REQUIRED SKILLS AND KNOWLEDGE
• options, methods and practices for deductions, benefits and depreciations.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • organising financial data to highlight relevant features • presenting financial data in comprehensive format • completing Business Activity Statements • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of financial data, reports and documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of income and expenditure records • analysis of responses to case studies and scenarios • demonstration of techniques • review of tax liabilities calculations • oral or written questioning to assess knowledge of principles of double entry bookkeeping and accrual accounting • assessment of recommendations provided proposing constructive actions to enhance the effectiveness and efficacy of functions and services.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • general administration units • other financial administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Financial data may include:	• Australian Bureau of Statistics (ABS) economic data • budget variances • budgets and forecasts • cash flow/profit reports • financial markets monitoring services (e.g. Reuters) • financial/operational statements and reports (e.g. expenditures and receipts, profit and loss statements) • market valuations
Organisational requirements may include:	• financial analysis assessments • financial management manuals • legal and organisational policies, guidelines and requirements • OHS policies, procedures and programs • price and exchange parameters • quality assurance and/or procedures manuals • recording and filing systems • reporting requirements • standard financial analysis techniques
Conversion and consolidation procedures may include:	• moving averages • spreadsheets

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RANGE STATEMENT	
	• standardised variables • trend analysis • unit costs
Discrepancies may include:	• absence of auditable trail • expenditure report mismatches • inappropriate authorisations • incorrect payments • incorrect report formats • unreconciled cash flows and operating statements • variances from budget and phasings
Statutory requirements may include:	• delegated authorities • internal control procedures • reporting periods • taxation payment timings
Revenue gathering practices may include:	• billing schedules • fees and charges • investments • leasing • lending and financing • sales
Revenue documentation may include:	• bills • cash received • debit notes • declarations • invoices • sales proceeds
Available benefits and allowances may include:	• depreciation • donations • interest payments • sales tax deductions
Stated deadlines may include:	• annual reports • lodgement dates • monthly returns • payment schedules
Recommendations may include:	• cash flow • consolidation • expenses • loss

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RANGE STATEMENT	
	• profit • write-offs
Evidence may include:	• budgetary analysis • forecasts and estimates • order and supplier documentation • returns on investments • taxation and statutory returns
Significant issues may include:	• cost structures • internal controls • losses and returns • profitability • statutory obligations • suppliers
Format of reports may include:	• balance sheets • cash flow statements • electronic forms • financial year reports • operating statements • spreadsheets • statutory forms

Unit Sector(s)

Unit sector	

Competency field

Competency field	Finance - Financial Administration

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBFIA501A Report on finances related to international business

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to report on finances related to international business activity. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for compiling required financial information; identifying and meeting compliance requirements of relevant international, Australian and overseas finance regulations; and analysing the financial information to frame recommendations to improve compliance and the effectiveness of international business activity.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Compile financial information	1.1. Identify financial information related to international business activity and separate from domestic business activity for reporting and compliance purposes 1.2. Collect relevant current ***financial data***, convert to currency used in report, and evaluate and code to ensure consistency, quality and accuracy in accordance with ***organisational requirements*** 1.3. Use ***conversion and consolidation procedures*** to compile analysis in accordance with organisational requirements 1.4. Make, record and disclose asset and liability valuations, in accordance with organisational requirements 1.5. Identify, resolve or refer ***discrepancies***, unusual features or queries to the appropriate authority
2. Ensure compliance with relevant international finance regulations	2.1. Identify financial compliance requirements associated with international business activity for relevant ***international finance regulations*** 2.2. Access processes to ensure compliance with financial compliance requirements for relevant

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ELEMENT	PERFORMANCE CRITERIA
	international finance regulations, from workplace policies and procedures, and relevant ***information sources*** 2.3. Record income and expenditure to ensure compliance with ***statutory requirements*** 2.4. Calculate liabilities for tax in accordance with relevant legislation 2.5. Identify relevant receipts, ***revenue documentation*** and payments correctly 2.6. Ensure statements and claims take full advantage of available ***benefits and allowances*** in accordance with statutory requirements 2.7. Submit statutory requirement reports to appropriate authorities within stated ***deadlines***
3. Provide financial business recommendations	3.1. Derive ***recommendations*** logically and support with ***evidence*** in report 3.2. Ensure recommendations propose constructive actions to enhance the effectiveness and efficacy of functions and services related to international business activity 3.3. Ensure recommendations are concise and facilitate direction and control of organisation's international operations 3.4. Identify and prioritise significant ***issues*** in statements, including comparative financial performances, for review and decision making 3.5. Ensure structure and ***format*** of reports are clear and conform to organisational and statutory requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • organisational skills to complete tasks accurately and with attention to detail

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REQUIRED SKILLS AND KNOWLEDGE
• financial management skills to report on international finances with integrity and financial probity • literacy skills to write complex financial reports • numeracy skills to produce complex financial reports • research, information-gathering, analytical, evaluation and assessment skills to report on the financial aspects of an international business • technology skills to gather, store, use and report on financial information.
Required knowledge

• organisational procedures and requirements relating to compliance issues and financial reporting
• principles of accounting and financial systems
• product or service knowledge for the products/services being marketed and traded by the organisation internationally
• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • Trade Practices Act
  • World Trade Organisation rules
  • bilateral or regional trade agreements
  • International Commercial Terms (INCOTERMS)
  • Warsaw Convention
  • occupational health and safety (OHS)
• sources of information to facilitate compliance with relevant international finance regulations.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of the collation and analysis of financial data for the international business operations of an organisation in compliance with Australian, international and overseas financial

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EVIDENCE GUIDE	
	regulations • financial report on the organisation's international business operations containing recommendations for improvements in both compliance and the efficiency of the organisation's international business operations • knowledge of relevant Australian, international and local legislation and conventions.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to workplace documents including completed reports • access to relevant information sources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of financial performance of international business activities • observation of techniques used to report on finances related to international trade/business • oral or written questioning to assess knowledge of principles of accounting and financial systems • review of recording of income and expenditure • assessment of asset and liability valuations recorded and disclosed • assessment of prioritisation of significantissues in statements, for review and decision making.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • finance units • international business units

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Financial data may include:	• budgets, forecasts and variations • cash flow/profit reports • financial/operational statements and reports (e.g. expenditures and receipts, profit and loss statements) • market valuations
Organisational requirements may include:	• financial analysis assessments • financial management manuals • legal and organisational policy/guidelines and requirements • OHS policies, procedures and programs • price and exchange parameters • quality assurances and/or procedures manuals • recording and filing systems • reporting requirements • standard financial analysis techniques
Conversion and consolidation procedures may include:	• moving averages • spreadsheets • standardised variables • trend analysis • unit costs
Discrepancies may include:	• absence of auditable trail • expenditure report mismatches • inappropriate authorisations • incorrect payments • incorrect report formats • unreconciled cash flows and operating statements • variances from budget and phasings
International finance regulations may include:	• Australian government regulatory authorities • international organisations and bodies • regulatory authorities in overseas countries

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RANGE STATEMENT	
Information sources may include:	• academics and training providers • Austrade and other Australian, state/territory government departments and agencies • overseas embassies, consulates, government departments and agencies within Australia and overseas • trade and industry publications
Statutory requirements may include:	• delegated authorities • internal control procedures • limits on volumes and types of financial transactions • reporting of duty, excise and other overseas government charges • reporting periods • taxation and payment timings
Revenue documentation may include:	• bills • cash received • countertrade documentation • debit notes • declarations • forfaiting records • invoices • other documentation involving exchange of money or goods in place of money • records of barter • sales proceeds
Benefits and allowances may include:	• depreciation • donations • goods and services tax (GST) credits derived from export deductions • interest payments • other allowances made to exporters by the Australian government • other allowances made to international traders by overseas governments
Deadlines may include:	• annual reports • lodgement dates • monthly returns • payment schedules
Recommendations may include:	• cash flow

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RANGE STATEMENT	
	• changes in business activity including markets, goods or services traded • consolidation • expenses and overheads • labour costs including decisions to move production partly or wholly offshore • loss • profit • write-offs
Evidence may include:	• budgetary analysis • documented costs • forecasts and estimates • order and supplier documentation • returns on investments • taxation and statutory returns
Issues may include:	• cost structures • internal controls • losses and returns • profitability • statutory obligations • suppliers and markets
Format may include:	• audits • balance sheets • cash flow statements • electronic forms • financial year reports • operating statements • spreadsheets • statutory forms

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Business Development - International Business

Co-requisite units

Co-requisite units		

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BSBFIM501A Manage budgets and financial plans

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake financial management within a work team in an organisation. This includes planning and implementing financial management approaches, supporting team members whose role involves aspects of financial operations, monitoring and controlling finances, and reviewing and evaluating effectiveness of financial management processes in line with the financial objectives of the work team and the organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit addresses the requirement for managers to ensure that financial resources are used effectively. This is done by ensuring access to budget/s and ongoing monitoring expenditure against the budget/s. The unit applies to managers working in small and large business environments and not for profit organisations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Plan financial management approaches	1.1. Access ***budget/financial plans*** for the work team 1.2. Clarify budget/financial plans with ***relevant personnel*** within the organisation to ensure that documented outcomes are achievable, accurate and comprehensible 1.3. Negotiate any changes required to be made to budget/financial plans with relevant personnel within the organisation 1.4. Prepare ***contingency plans*** in the event that initial plans need to be varied
2. Implement financial management approaches	2.1. Disseminate relevant details of the agreed budget/financial plans to team members 2.2. Provide ***support*** to ensure that team members can competently perform ***required roles*** associated with the management of finances 2.3. Determine and access ***resources and systems*** to manage financial management processes within the

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ELEMENT	PERFORMANCE CRITERIA
	work team
3. Monitor and control finances	3.1. Implement ***processes*** to monitor actual expenditure and to control costs across the work team 3.2. Monitor expenditure and costs on an agreed cyclical basis to identify cost variations and expenditure overruns 3.3. Implement, monitor and modify contingency plans as required to maintain financial objectives 3.4. ***Report*** on budget and expenditure in accordance with organisational protocols
4. Review and evaluate financial management processes	4.1. Collect and collate for analysis, ***data and information on the effectiveness of financial management processes*** within the work team 4.2. Analyse data and information on the effectiveness of financial management processes within the work team and identify, document and recommend any improvements to existing processes 4.3. Implement and monitor agreed improvements in line with financial objectives of the work team and the organisation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• numeracy skills to read and understand a budget and to update a budget • technology skills to use software associated with financial record keeping.
Required knowledge
• basic accounting principles • organisational requirements related to financial management • relevant legislation and current requirements of the Australian Taxation Office, including GST • requirements for organisational record keeping and auditing • principles and techniques involved in: • budgeting

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REQUIRED SKILLS AND KNOWLEDGE
• cash flows • electronic spreadsheets • GST • ledgers and financial statements • profit and loss statements.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • financial skills required to work with and interpret budgets, ageing summaries, cash flow, petty cash, GST, and profit and loss statements • knowledge of the record keeping requirements for the ATO and for auditing purposes.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports indicating broad knowledge of managing budgets and managing financial resources in the organisation • demonstration of techniques using financial record keeping software • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of requirements for organisational record keeping and auditing

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EVIDENCE GUIDE	
	• review of contingency plans • review of identification of cost variations and expenditure overruns • evaluation of documentation reportingon budget and expenditure • review of documentation identifying and recommending improvements to financial management processes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Budget/financial plans may include:	• cash flow projections • long-term budgets/plans • operational plans • short-term budgets/plans • spreadsheet-based financial projections • targets or key performance indicators for production, productivity, wastage, sales, income and expenditure
Relevant personnel may include:	• financial managers, accountants or financial controllers • supervisors, other frontline managers
Contingency plans may include:	• contracting out or outsourcing human resources and other functions or tasks • diversification of outcomes • finding cheaper or lower quality raw materials and consumables

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RANGE STATEMENT	
	• increasing sales or production • recycling and re-using • rental, hire purchase or alternative means of procurement of required materials, equipment and stock • restructuring of organisation to reduce labour costs • risk identification, assessment and management processes • seeking further funding • strategies for reducing costs, wastage, stock or consumables • succession planning
Support may include:	• access to specialist advice • documentation of procedures • help desk or identified experts within the organisation • information briefings or sessions • intranet-based information • training including mentoring, coaching and shadowing
Required roles may include:	• arranging for use of corporate credit cards • banking • debt collection • ensuring security, accuracy and currency of financial operations • invoicing clients, customers and consumers • maintaining journals, ledgers and other record keeping systems • maintaining petty cash system • purchasing and procurement • wages and salaries payments and record keeping
Resources and systems may include:	• hardware and software • human, physical or financial resources • record keeping systems (electronic and paper-based) • specialist advice or support

Processes to monitor actual expenditure and to control costs across the work team include:	• reporting of:
	  • assets
	  • consumables

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RANGE STATEMENT	
	• equipment • expenditure • income • stock • wastage
Reporting may include data from:	• bank statements • credit card statements • financial reports • invoices and receipts • ledgers and journals • logs • petty cash records • spreadsheet-based records
Data and information on the effectiveness of financial management processes may include records (paper-based and electronic) related to:	• bank account records • cash flow data • contracts • credit card receipts • employee timesheets • files of paid purchase and service invoices • income and expenditure • insurance reports • invoices • job costings • petty cash receipts • quotations • taxation records • wages/salaries books

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

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Co-requisite units

Co-requisite units		

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BSBFIM502A Manage payroll

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish and monitor security procedures for managing organisational payroll services and to calculate and process salary payments, group taxation and related payments. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who are required to establish and work with payroll systems. They may work as senior administrative staff or may have responsibility for managing payroll systems and calculations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish procedures for the management of payroll	1.1. Establish ***security procedures*** that ensure the confidentiality and security of payroll information 1.2. Ensure procedures guarantee substantiation of claims for allowances 1.3. Establish ***control measures*** to safeguard organisation's financial resources in accordance with ***legislative and organisational requirements*** 1.4. Establish systems to ensure that statutory obligations are met and records are kept for the period determined by government legislation
2. Prepare payroll data	2.1. Use ***nominated industrial awards***, ***contracts and government legislation*** to ***calculate gross pay and annual salaries*** 2.2. Calculate ***statutory and voluntary deductions*** using government and employee documentation 2.3. Provide payroll data to payroll processor for calculation within ***designated time lines***
3. Authorise payment of salaries	3.1. Check payroll, and authorise salaries and wages for payment in accordance with organisational policy and procedures 3.2. Reconcile salaries, wages and deductions in accordance with organisational policy and procedures

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ELEMENT	PERFORMANCE CRITERIA
	3.3. Deal with salary, wage and related enquiries in accordance with organisational policy and procedures
4. Administer salary records	4.1. Process declaration forms for new and existing employees in accordance with Australian Taxation Office requirements 4.2. Forward periodic deductions to ***nominated creditors*** within designated time lines 4.3. Prepare and despatch payments to government authorities accurately and in accordance with the relevant government legislation 4.4. Calculate and transcribe group tax amounts and make payments in accordance with taxation procedures 4.5. Prepare and reconcile employee group certificate amounts from salary records

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to answer enquiries, and to explain and resolve discrepancies with employees
- literacy skills to follow complex financial procedures and to follow and write detailed instructions
- numeracy skills to:
- use financial formulae
- calculate gross and net pay
- compare differing rates of pay over a given time span of the same nature
- prepare cash analysis sheets
- reconcile figures and rectify anomalies to ensure accuracy.

Required knowledge

- key provisions of relevant legislation from all forms of government, standards, regulations and codes that may affect aspects of business operations, such as:

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REQUIRED SKILLS AND KNOWLEDGE
• Australian Taxation Office regulations • anti-discrimination legislation • ethical principles • codes of practice • financial legislation • privacy laws • relevant industrial awards • other relevant government and statutory bodies in relation to payroll • Superannuation Guarantee (Administration) Act and superannuation regulations • organisational policies and procedures across the full range of tasks requiredpayroll processes.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documenting steps undertaken to establish payroll system • using data and calculations to calculate payroll, including a range of deductions • preparing appropriate records to record payroll processing.

Context of and specific resources for assessment	Assessment must ensure:
	• access to office equipment and resources, such as:
	  • Australian Accounting and Auditing Standards
	  • calculator
	  • certified or workplace agreements
	  • computer equipment and relevant software
	  • HECS/HELP documentation
	  • organisation's accounting system
	  • organisational contracts
	  • paper-based or electronic payroll system

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EVIDENCE GUIDE	
	• relevant Australian Taxation Office legislation • relevant industrial Awards • Superannuation Guarantee (Administration) Act • access to samples of financial data.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • oral or written questioning to assess knowledge of accounting procedures and techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • financial administrationunits • other financial management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Security procedures may include:	• authorised access • back-up files • computer passwords • employees signing for pay • ensuring security of passwords and keys • keeping payroll documents secure • maintaining security and confidentiality of

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RANGE STATEMENT	
	employees' details • numbering payroll registers • restricting access to electronic files and locking paper-based confidential information • separating locations of confidential information • storage of information off site • supervision of timesheets
Control measures may include:	• authorisation requirements • dual checking system • internal control policies and procedures • multiple checks and balances • reconciliation of records • separation of duties
Legislative and organisational requirements may include:	• Australian Accounting and Auditing Standards • Australian Securities and Investments Commission (ASIC) requirements • Australian Taxation Office regulations • corporations law • Fringe Benefits Tax (FBT) • Higher Education Contribution Scheme (HECS) • Higher Education Loan Programme (HELP) • legislation and regulations in relation to superannuation such as the Superannuation Guarantee (Administration) Act • organisational policy and procedures for cash handling • Pay As You Go (PAYG) tax • superannuation • tax file number
Nominated industrial awards, contracts and government legislation may include:	• certified and workplace agreements • enterprise agreements • federal and state/territory awards • use of Wageline
Calculating gross pay and annual salaries may include:	• allowances • annual leave loading • appropriate pay structure • deductions • employment history cards

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RANGE STATEMENT	
	• FBT • FBT returns • long service leave • overtime • penalty rates • salary packaging items • salary sacrificing • sick leave • time sheets
Statutory and voluntary deductions may include:	• HECS • HELP • insurance • Medicare levy • PAYG tax • payroll tax • superannuation levy • union fees
Designated time lines may include:	• Australian Taxation Office time lines for submission such as group tax, fringe benefits tax • Business Activity Statement (BAS) • stipulated time period before employee departs organisation • stipulated time period before pay is due to employees • organisational time lines
Nominated creditors may include:	• Australian Taxation Office • government agencies • health funds • membership organisations • those nominated as part of salary packaging • union • vehicle leasing organisations

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Finance - Financial Management

Co-requisite units

Co-requisite units		

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BSBFIM601A Manage finances

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake budgeting, financial forecasting and reporting requirements, and to allocate and manage resources to achieve the required outputs for the business unit. It includes contributing to financial bids and estimates, allocating funds, managing budgets and reporting on financial activity. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to people who have managerial responsibilities which include overseeing the management of financial and other resources across a business unit, a series of business units or teams, or an organisation. It covers all areas of broad financial management. In a larger organisation this work would be supported by specialists in financial management.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Plan for financial management	1.1. Review and analyse previous ***financial data*** to establish areas which have generated a profit or loss 1.2. Undertake research to review reasons for previous profit and loss 1.3. Review business plan to establish critical dates and initiatives that will require or generate resources in next financial cycle 1.4. Analyse cash flow trends 1.5. Review statutory requirements for compliance and liabilities for tax 1.6. Review existing software and its suitability for financial management
2. Establish budgets and allocate funds	2.1. Use previous financial data to determine allocations for resources 2.2. Make informed estimates of new items for inclusion

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ELEMENT	PERFORMANCE CRITERIA
	in budget 2.3. Prepare budgets in accordance with ***organisational requirements*** and ***statutory requirements***
3. Implement budgets	3.1. Circulate budgets and ensure managers and supervisors are clear about budgets, reporting requirements and financial delegations 3.2. Manage risks by checking there are no opportunities for misappropriation of funds and that systems are in place to properly record all financial transactions 3.3. Review profit and loss statements, cash flows and ageing summaries 3.4. Revise budgets, as required, to deal with contingencies 3.5. Maintain audit trails to ensure accurate tracking and to identify ***discrepancies*** between agreed and actual allocations 3.6. Ensure compliance with due diligence
4. Report on finances	4.1. Ensure structure and ***format*** of reports are clear and conform to organisational and statutory requirements 4.2. Identify and prioritise significant ***issues*** in statements, including comparative financial performances for review and decision making 4.3. Prepare ***recommendations*** to ensure financial viability of the organisation 4.4. Evaluate the effectiveness of financial management processes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to explain budgets and reporting requirements, and to deal with questions • mathematical skills to read and interpret budgets • technology skills to work with financial software.
Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE

• financial probity
• principles of accounting and financial systems
• relevant Australian, international and local legislation and conventions, such as:
  • bilateral or regional trade agreements
  • International Commercial Terms (INCOTERMS)
  • Trade Practices Act
  • Warsaw Convention
  • World Trade Organization determinations
• requirements of the Australian Tax Office, including Goods and Services Tax, Company Tax, PAYG.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • preparation of budgets which align with the business plan, use previous financial data and meet all compliance requirements • analysis of the effectiveness of existing financial management approaches • knowledge of the requirements of the Australian Tax Office.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on financial systems and financial management • direct questioning combined with review of portfolios of evidence and third party workplace

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EVIDENCE GUIDE	
	reports of on-the-job performance by the candidate • review of budgets prepared • oral or written questioning to assess knowledge of legislative requirements or the tax system • evaluation of documentation reviewing profit and loss statements, cash flows and ageing summaries • analysis of maintenance of audit trails • review of recommendations prepared to ensure the financial viability of the organisation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the BSB60407 Advanced Diploma of Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Financial data may include:	• budgets, forecasts and variations • cash flow/profit reports • financial/operational statements and reports (e.g. expenditures and receipts, profit and loss statements) • market valuations
Organisational requirements may include:	• financial analysis assessments • financial management manuals • legal and organisational policies, guidelines and requirements • occupational health and safety policies, procedures and programs • price and exchange parameters • quality assurance and/or procedures manuals

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RANGE STATEMENT	
	• recording and filing systems • reporting requirements • standard financial analysis techniques
Statutory requirements may include:	• delegated authorities • internal control procedures • limits on volumes and types of financial transactions • reporting of duty, excise and other overseas government charges • reporting periods • taxation and payment timings
Discrepancies may include:	• absence of auditable trail • expenditure report mismatches • inappropriate authorisations • incorrect payments • incorrect report formats • unreconciled cash flows and operating statements • variances from budget and phasings
Format may include:	• audits • balance sheets • cash flow statements • electronic forms • financial year reports • operating statements • spreadsheets • statutory forms
Issues may include:	• cost structures • internal controls • losses and returns • profitability • statutory obligations • suppliers and markets
Recommendations may refer to:	• cash flow • changes in business activity including markets, goods or services traded • consolidation • expenses and overheads • labour costs including decisions to move production to other locations or sites

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RANGE STATEMENT	
	• loss • profit • write-offs

Unit Sector(s)

Unit sector	

Competency field

Competency field	Finance - Financial Management

Co-requisite units

Co-requisite units		

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BSBFIM701A Manage financial resources

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage financial resources in a complex environment for a substantial business unit or organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Leaders in learning operations are typically required to forecast future financial resource needs, analyse current asset performance and capacity to a standard expected in a commercial environment, and to set business targets. There will be a requirement to manage compliance mechanisms, to mange financial risk within agreed plans and mechanisms, and to monitor compliance with financial projections. This unit will have specific relevance for leaders or managers working to leverage how learning can enhance individual, team and organisational capabilities. Management of financial resources relating to complex and diverse training operations or projects is an important aspect of work for managers in training and/or assessment organisations or leaders seeking to implement organisational learning. The unit may relate equally to small scale learning activities within a small to medium sized organisation or a significant activity in a large organisation.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Forecast future financial resource needs	1.1. Establish and report on the capacity of existing financial ***systems*** 1.2. Forecast ***financial data*** and business system requirements 1.3. Analyse forecasted requirements 1.4. Prepare and plan budget forecasts according to organisational and ***statutory requirements*** 1.5. Prepare and present recommendations for budget expenditure or for modification of existing

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ELEMENT	PERFORMANCE CRITERIA
	projections
2. Analyse current asset performance and capacity	2.1. Analyse the costs of, and returns from, assets and liabilities using ***standard accounting techniques*** to identify extent of debt and equity financing 2.2. Establish ***management responsibilities*** and ***legal requirements*** for reporting, in consultation with relevant organisational staff 2.3. Analyse and interpret financial reports and ***key information*** 2.4. Analyse and evaluate the effects of financial decisions on the ability of the organisation to meet planned outcomes
3. Set business targets and compliance mechanisms	3.1. Collect ***comparative and trend information*** and confirm needs for future budget and associated resources 3.2. Complete negotiations to secure resources in accordance with relevant short-term and long-term needs 3.3. Allocate resources against the budget to maximise organisation's performance 3.4. Maintain accurate and up-to-date records of resource allocation and usage according to ***organisational requirements*** 3.5. Develop and review management systems which enable timely collection, management and processing of information 3.6. Complete and accurately report records of budget performance and expenditure according to organisational procedures and statutory requirements 3.7. Evaluate and improve budget audit mechanisms and compliance requirements as required
4. Manage financial risk	4.1. Identify and analyse financial ***risk*** factors 4.2. Document and manage financial risks according to organisational policies and procedures 4.3. Implement procedures to review financial ***risk management*** activities regularly
5. Monitor compliance with financial projections	5.1. Identify deviations from budgets that generate an adverse affect on budget objectives 5.2. Promptly develop action plans to remedy significant deviations from budget objectives and projections 5.3. Monitor and review ***financial documentation***

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ELEMENT	PERFORMANCE CRITERIA
	against organisational objectives 5.4. Revise and renew budget priorities to meet operational contingencies and risk management 5.5. Manage costs to targets set in the budget

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• analytical skills to identify potential risks of any type
• communication skills to identify financial information and to follow Australian Accounting and Auditing Standards, and the organisation's accounting procedures
• decision making skills
• interpersonal skills to:
  • maintain appropriate relationships with colleagues
  • establish trust
  • value and be open to, the opinions of others
  • work as part of a team
  • listening actively
• negotiation skills
• planning and organisation skills to timetable and schedule reports and lodgements
• problem-solving, initiative and enterprise skills to prepare budgets and to monitor their implementation
• research skills to identify valuations and applicable professional standards
• risk management skills.

Required knowledge
• accounting, financial statements and cash flow • communication processes and methods • compliance requirements • cost of capital, capital structure and working capital • finance and investment decisions • goal of financial resource management • legislation, codes and by-laws relevant to the organisation's operations • principles of finance • relevant legislation from all levels of government that affect business operation,

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REQUIRED SKILLS AND KNOWLEDGE
especially occupational health and safety (OHS) and environmental issues, equal opportunity, industrial relations and anti-discrimination • risk and return .

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • preparing a financial resource plan/budget • monitoring and managing financial resources over a full planning cycle • effectively communicating financial reports and operational execution • transferring competence to changing circumstances and responding to unusual situations • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace contractual and procurement documentation • competence is consistently demonstrated over time, and over a range and variety of situations • access to appropriate documentation and resources normally used in the workplace • access to an appropriate operating environment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • completion of applied projects or learning activities, such as budget preparation, analysis and reporting, preparation of financial forecasts, and review and

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EVIDENCE GUIDE	
	analysis of costs • direct observation of contextual application of skills • oral or written questioning to assess knowledge of risk and return • review of documentation displaying compliance with professional and regulatory standards for financial management.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLED710A Develop human capital.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Systems are defined as:	• a detailed description/depiction of how organisations relate to their environments and how they process information through strategic and tactical management to develop actual operating procedures
Financial data may include:	• Australian Bureau of Statistics (ABS) economic data • balance sheet • benchmarks or trend analysis • budget variances • budgets and forecasts • cash flow/profit reports • financial/operational statements and reports (such as expenditures and receipts, profit and loss statements) • financial markets monitoring services (such as Reuters) • income statements

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RANGE STATEMENT	
	• market valuations
Statutory requirements may include:	• delegated authorities • internal control procedures • reporting periods • taxation payment timings
Standard accounting techniques relating to the management of financial resources for an organisation may include:	• deprival asset valuations • direct and indirect allocation • discounted cash flows • impact statements • internal rate of return • net present value • pay back break even periods • pro-rata and percentage apportionment • rates of return
Management responsibilities may include:	• organisational policies, procedures, guidelines, ethical and/or professional standards

Legal requirements may include:	• private sector requirements such as:
	  • Australian Accounting Standards (SAC 1, 2, Framework AASB1001)
	  • Corporations Act 2001
	  • GST and income tax reporting
	• public sector requirements such as:
	  • Financial Administration and Audit Act 1977
	  • Financial Management Standard 1997

Key information may include:	• gross profit • net profit • return on investment • Or for public or not-for-profit organisations: • best use of resources • surplus/deficit against budget • value for money
Comparative and trend information includes:	• availability of external funding sources • benchmarks as agreed • business activity • brand value • expenses • leverage • liquidity

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RANGE STATEMENT	
	• profitability • return on equity • sales • wages
Organisational requirements may include:	• financial analysis assessments • financial management manuals • legal and organisational policies, guidelines and requirements • OHS policies, procedures and programs • price and exchange parameters • quality assurance and/or procedures manuals • recording and filing systems • reporting requirements • standard financial analysis techniques
Risks may include:	• damage to property/equipment • environmental • equipment/system failures • financial/economic loss/failure • industrial disputation • market changes • natural disasters • OHS including disease • political events • product failure • professional incompetence • security failure (including criminal or terrorist activities)
Risk management is:	• the process of identification of potential negative events and the development of plans to mitigate or minimise the likelihood of the negative event occurring and/or the consequences in the event it does occur
Financial documentation relating to the management of financial resources for an organisation may include:	• balance sheets • budgetary analysis • electronic forms • financial year reports • forecasts and estimates • operating statements • order and supplier documentation • returns on investments

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RANGE STATEMENT	
	• spreadsheets • taxation and statutory returns

Unit Sector(s)

Unit sector	

Competency field

Competency field	Finance - Financial Management

Co-requisite units

Co-requisite units		

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BSBFLM303C Contribute to effective workplace relationships

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to gather information and maintain effective working relationships and networks, with particular regard to communication and representation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Frontline managers have a key role in contributing to efficient and effective work teams within the context of the organisation. They play a prominent part in motivating, mentoring, coaching and developing team cohesion through providing leadership for the team and forming the bridge between the management of the organisation and the team members. At this level, work will normally be carried out within known routines, methods and procedures which require the exercise of some discretion and judgement. This unit is related to BSBWOR401A Establish effective workplace relationships.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Seek, receive and communicate information and ideas	1.1. Collect ***information*** associated with the achievement of work responsibilities from appropriate ***sources*** 1.2. Communicate ideas and information to ***diverse audiences*** in an appropriate and sensitive manner 1.3. Seek contributions from internal and external sources to develop and refine new ideas and approaches in accordance with organisational processes 1.4. Facilitate ***consultation processes*** to allow employees to contribute to issues related to their work, and promptly communicate outcomes of consultation to the work team 1.5. Promptly deal with and resolve issues raised, or refer them to ***relevant personnel***
2. Encourage trust and	2.1. Treat people with integrity, respect and empathy

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ELEMENT	PERFORMANCE CRITERIA
confidence	2.2. Encourage effective relationships within the framework of ***the organisation's social***, ***ethical and business standards*** 2.3. Gain and maintain the trust and confidence of ***colleagues***, ***customers and suppliers*** through competent performance 2.4. Adjust interpersonal styles and methods in relation the to organisation's social and cultural environment
3. Identify and use networks and relationships	3.1. Identify and utilise ***workplace networks*** to help build relationships 3.2. Identify and describe the value and benefits of networks and other work relationships for the team and the organisation
4. Contribute to positive outcomes	4.1. Identify difficulties and take action to rectify the situation within own level of responsibility according to organisational and legal requirements 4.2. Support colleagues in resolving work difficulties 4.3. Regularly review ***workplace outcomes*** and implement improvements in consultation with relevant personnel 4.4. Identify and resolve ***poor work performance*** within own level of responsibility and according to organisational policies 4.5. Deal constructively with conflict, within the organisation's established processes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- coaching and mentoring skills to provide support to colleagues
- functional literacy skills to access and use workplace information
- relationship management and communication skills to:
  - interpret information from a variety of people
  - respond to unexpected demands from a range of people

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REQUIRED SKILLS AND KNOWLEDGE
• gain the trust and confidence of colleagues • deal with people openly and fairly • forge effective relationships with internal and/or external people.
Required knowledge

• principles and techniques associated with relationship management, including:
  • developing trust and confidence
  • behaving consistently in work relationships
  • identifying the cultural and social environment
  • identifying and assessing interpersonal styles
  • establishing networks
  • identifying and resolving problems
  • handling conflict
  • managing poor work performance
  • monitoring and improving work relationships
  • using anti-discrimination/bias strategies and making contributions
• relevant legislation from all levels of government that may affect business operation, especially in regard to:
  • occupational health and safety and environmental issues
  • equal opportunity
  • industrial relations
  • anti-discrimination.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • using culturally appropriate communication techniques to share work-based information with teams and individuals in accordance with organisation policies • developing networks and building team relationships

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EVIDENCE GUIDE	
	• regularly reviewing workplace outcomes to identify and resolve issues and implement improvements within own level of responsibility and according to organisational policies.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge and understanding of principles of relationship management and organisation's social, ethical and business standards • presentation of examples of actions taken by the candidate to build networks and contribute to positive workplace relationships and outcomes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other management or frontline managementunits.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information may include:	• archived, filed and historical background data • electronic or manual transmission • individual and team performance data • marketing and customer-related data

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RANGE STATEMENT	
	• organisation policies and procedures • planning and organisational documents including the outcomes of continuous improvement and quality assurance • written or verbal communications

Sources of information may be:	• external, such as:
	  • external customers
	  • web based resources
	  • reports
	• internal, such as:
	  • supervisors, managers and peers
	  • organisation policies and procedures
	  • workplace documents

Diverse audiences may include:	• persons with specific social, cultural and other needs that require a range of strategies and approaches including adjusting communication
Consultation processes may include:	• feedback to the work team and relevant personnel in relation to outcomes of the consultation process • opportunity for employees to contribute ideas and information
Relevant personnel may include:	• OHS committees and OHS representatives • people with specialist responsibilities • supervisors, managers and other employees • union representatives/groups

The organisation's social, ***ethical and business standards*** may refer to:	• implied standards such as honesty and respect relative to the organisation culture and generally accepted within the wider community
	• rewards and recognition for high performing staff
	• standards expressed in legislation and regulations such as anti-discrimination legislation
	• written standards such as those expressed in:
	  • vision and mission statements
	  • policies
	  • code of workplace conduct/behaviour
	  • dress code
	  • statement of workplace values

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RANGE STATEMENT	
Colleagues, customers and suppliers may include:	• employees at the same level and more senior managers • internal and external contacts • people from a wide variety of social, cultural and ethnic backgrounds • team members
Workplace networks may be:	• formal or informal • individuals or groups • internal or external • structured or unstructured
Workplace outcomes may include:	• OHS processes and procedures • performance of the work team
Poor work performance may relate to:	• self or work team; or it may extend to the organisation as a whole

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Frontline Management

Co-requisite units

Co-requisite units		

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BSBFLM305C Support operational plan

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide support for operational practices and procedures within the organisation's productivity and profitability plans. This includes contributing to the operational plan, assisting in recruiting employees and acquiring resources, and monitoring and adjusting operational performance. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Frontline managers are actively engaged in planning activities to achieve the measurable, stated objectives of the team and the organisation. This key role is carried out to provide safe, efficient and effective products and services to customer satisfaction within the organisation's productivity and profitability plans. At this level, work will normally be carried out within known routines, methods and procedures, and may also involve a number of complex or non routine activities that require some discretion and judgement. This unit is related to BSBMGT402A Implement operational plan.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Contribute to implementation of operational plan	1.1. Collect and record details of ***resource requirements*** and report to ***relevant personnel*** 1.2. Ensure the ***operational plan*** contributes to the achievement of the organisation's performance and business plan 1.3. Identify ***key performance indicators*** to measure own and work team's performance 1.4. Undertake ***contingency planning*** as required 1.5. Support the development and presentation of proposals for resource requirements as required
2. Assist in recruiting employees and acquiring resources	2.1. Assist with employee recruitment and/or induction as required, within ***the organisation's policies***, ***practices and procedures*** 2.2. Acquire physical resources and services according

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ELEMENT	PERFORMANCE CRITERIA
	to the organisation's policies, practices and procedures and in consultation with relevant personnel
3. Support operations	3.1. Identify and utilise ***performance systems and processes*** to assess team progress in achieving plans and targets 3.2. Compare actual productivity and performance with identified short-term budgets, targets and performance results 3.3. Identify and report unsatisfactory performance to relevant personnel, to enable action to be taken to rectify the situation 3.4. Provide coaching to support individuals and teams to use resources effectively, economically and safely 3.5. Support ***consultation processes*** for the development and/or variation of the operational plan as required 3.6. Present recommendations for variation to operational plans to relevant personnel 3.7. Follow performance ***systems***, ***procedures and recording processes*** in accordance with organisation requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- coaching and mentoring skills to provide support to colleagues
- functional literacy skills to access and use workplace information
- skills to:
  - maintain a safe workplace and environment
  - access and use feedback to improve operational performance
  - prepare recommendations to improve operations
  - access and use established systems and processes.

Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE

• principles and techniques of:
  • short-term operational scheduling
  • physical resources and services acquisition procedures and/or systems
  • budget and performance figures interpretation
  • performance monitoring within defined job role
  • performance reporting
  • problem identification and resolution
  • alternative approaches to improving resource usage and eliminating resource inefficiencies and waste within defined job role
• relevant legislation from all levels of government that may affect business operations, especially in regard to occupational health and safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
• support for individuals and teams who have difficulty in performing to the required standard.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • sharing information with members of the work team about implementing and monitoring the operational plan • assisting in planning resource acquisition and usage including human resources, risk management and contingency planning • monitoring, analysing and reporting individual and team performance against identified targets.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess

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EVIDENCE GUIDE	

	practical skills and knowledge. The following examples are appropriate for this unit:
	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate
	• records produced while working with the operational plan, such as:
	  • suggestions for variations to the operational plan
	  • rosters and staff allocation
	  • short-term resource acquisition planning, contingency planning and/or risk management plans
	  • induction programs conducted
	  • suggestions and input into management decisions related to the operational plan
	  • records of actions taken to address day-to-day resource shortfalls.

Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBFLM303C Contribute to effective workplace relationships • BSBFLM306C Provide workplace information and resourcing plans • BSBFLM312C Contribute to team effectiveness • BSBCMN311B Maintain workplace safety.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Resource requirements may include:	• purchasing or ordering of goods • stock requirements and requisitions

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RANGE STATEMENT	
	• supply of resources.
Relevant personnel may include:	• colleagues, supervisors and managers • OHS committees and other people with specialist responsibilities • specialist resource managers • unions/employee groups • other employees.
Operational plan may include:	• organisational plans • tactical plans developed by the department or section to detail product and service performance.
Key performance indicators may refer to:	• measures for monitoring or evaluating the efficiency or effectiveness of a system, and which may be used to demonstrate accountability and identify areas for improvements.
Contingency planning may refer to:	• contracting or outsourcing human resource and other functions or tasks • diversification of outcomes • finding cheaper or lower quality raw materials and consumables • increasing sales or production • recycling and re-use • rental, hire purchase or alternative means of procurement of required materials, equipment and stock • restructuring of organisation to reduce labour costs • risk identification, assessment and management processes • seeking further funding • strategies for reducing costs, wastage, stock or consumables • succession planning.
The organisation's policies practices and procedures may include:	• organisational guidelines which govern and prescribe operational functions, such as the acquisition and management of human and physical resources • organisational culture • Standard Operating Procedures • undocumented practices in line with organisational operations.

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RANGE STATEMENT	

Performance systems and processes may be:	• formal or informal processes within the organisation, such as:
	  • Key Performance Indicators (KPIs)
	  • specified work outcomes
	  • individual and team work plans
	  • feedback arrangements
	• informal systems used in the place of existing organisation-wide systems.

Consultation processes may refer to:	• mechanisms used to provide feedback to the work team in relation to outcomes of consultation • meetings, interviews, brainstorming sessions, email/intranet communications, newsletters or other processes and devices which ensure that all employees have the opportunity to contribute to team and individual operational plans.
Performance systems, procedures and recording processes may include:	• databases and other recording mechanisms • individual and team performance plans • organisational policies and procedures relative to performance.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Frontline Management

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBFLM306C Provide workplace information and resourcing plans

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to support the information management system. It involves the identification, acquisition, initial analysis and use of appropriate workplace information. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Frontline managers, in supporting the processes of identifying, acquiring, analysing and using appropriate information, play a significant part in the organisation's effectiveness. At this level, work will normally be carried out within known routines, methods and procedures, and may also involve a number of complex or non routine activities that require some discretion and judgement. This unit is related to BSBINM401A Implement workplace information system.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Locate relevant information	1.1. Identify and locate ***information*** required by teams 1.2. Acquire and review information according to organisational procedures 1.3. Apply ***plans and procedures*** to obtain information which is not immediately available/accessible
2. Collect and report information	2.1. Collect information relevant to the needs of teams in an adequate and timely manner 2.2. Ensure information acquired is in a format suitable for analysis, interpretation and dissemination 2.3. Use information to identify and report relevant trends and developments to ***relevant personnel***, within the limits of own role
3. Use information	3.1. Effectively use ***management information systems*** to

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ELEMENT	PERFORMANCE CRITERIA
systems	store and retrieve data 3.2. Use available ***technology*** to manage information effectively 3.3. Report recommendations for improving information system to ***designated persons and/or groups***
4. Support the preparation of business plan and/or budgets	4.1. Effectively utilise the contribution of the work team when preparing ***business plans and/or budgets*** to gain support for the outcomes 4.2. Present and record information to support the preparation of business plans and/or budgets in accordance with the organisation's guidelines and requirements 4.3. Follow ***contingency plans*** in the event that alternative action is required
5. Support the preparation of resource proposals	5.1. Consult with ***colleagues*** to collect ***resource planning data*** as required 5.2. Report estimated resource needs and usage according to organisational requirements as necessary 5.3. Facilitate ***resourcing*** within limits of own role

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities • coaching and mentoring skills to provide support to colleagues • communication and research skills covering information collection, analysis and reporting • functional literacy skills to access and use workplace information • information preparation skills • skills to improve information usage in decision making • technical skills to extract and input information
Required knowledge
• a general understanding of:

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REQUIRED SKILLS AND KNOWLEDGE
• workplace information systems • operational plans and budgets • resource proposals • basic financial concepts relating operational plans and budgets • methods to gain efficiencies in operational resource management • relevant legislation from all levels of government which may affect business operations, especially in regard to occupational health and safety and environmental issues, equal opportunity, industrial relations and anti-discrimination

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • using management information system to collect, store and retrieve data supporting the preparation of business plans and/or budgets • involving the work team in planning and budget preparation • estimating resource needs and usage according to organisational requirements and allocating or acquiring resources within limits of own role.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • records produced from working in a team, such as:

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EVIDENCE GUIDE	
	• reports • minutes or records of meetings • work journals or diaries • learning and development plans developed with team members • records of actions taken to address issues raised by team members.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCUS301A Deliver and monitor a service to customers • BSBFLM305C Support operational plan • BSBFLM312C Contribute to team effectiveness • BSBCMN311B Maintain workplace safety.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information may include:	• archived, filed and historical background data • continuous improvement and quality assurance data • data available internally or externally • data shared and retrieved in various forms such as in writing or verbally, electronically or manually • financial and contractual data • marketing and customer-related data • organisational performance data • planning and organisational documents • policies and procedures.
Plans and procedures may	• action plans, project plans or more formal

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RANGE STATEMENT	
include:	planning tools in line with organisational procedures and levels of own responsibility • informal documents outlining a series of planned actions or steps • organisational procedures such as Standard Operating Procedures, record keeping procedures • organisational processes and procedures used to obtain information, with consideration given to meeting legislative requirements, such as privacy, anti-discrimination.
Relevant personnel may include:	• colleagues and specialist resource managers • OHS committees and OHS representatives • supervisors, managers and other staff/employees • other people with specialist responsibilities.
Management information systems may be:	• the entire infrastructure of an organisation, including personnel, and the components for the collection, processing, storage, transmission, display, dissemination, and disposition of information.
Technology may include:	• computerised systems and software such as databases, project management and word-processing • telecommunications devices • other technology available in the workplace and used to carry out work roles and responsibilities.
Designated persons or groups may include:	• groups designated in workplace policies and procedures • the frontline manager's supervisors or others with management roles and responsibilities concerning information systems • other stakeholders accessing the information system such as customers and service providers • other work groups or teams whose work will be affected by the system.
Business plans and/or budgets may refer to:	• cash flow projections • long or short term budgets/plans relative to own responsibilities • operational plans

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RANGE STATEMENT	
	• spreadsheet-based financial projections • targets or Key Performance Indicators (KPIs) for production, productivity, wastage, sales, income and expenditure.
Contingency plans will usually be developed by others and may include:	• contracting out or outsourcing human resource and other functions or tasks • diversification of outcomes • finding cheaper or lower quality raw materials and consumables • increasing sales or production • recycling and re-use • rental, hire purchase or alternative means of procurement of required materials, equipment and stock • restructuring of organisation to reduce labour costs • risk identification, assessment and management processes • seeking further funding • strategies for reducing costs, wastage, stock or consumables.
Colleagues may include:	• employees at the same level or more senior managers • OHS representatives • people from a wide variety of social, cultural and ethnic backgrounds and physical and mental abilities • team members.
Resource planning data may relate to:	• buildings/facilities • equipment/technology • finance • information • people • power/energy • targets or Key Performance Indicators (KPIs) for production, productivity, wastage, sales, income and expenditure • time.
Resourcing may include:	• purchasing or ordering of goods • stock requirements/requisitions • supply of resources.

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Frontline Management

Co-requisite units

Co-requisite units		

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BSBFLM309C Support continuous improvement systems and processes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit specifies the outcomes required to support the organisation's continuous improvement systems and processes. Particular emphasis is on actively encouraging the team to participate in the process, on monitoring and reporting on specified outcomes and on supporting opportunities for further improvements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit replaces BSBFLM309A Support continuous improvement systems and processes. Frontline managers have an active role in supporting continuous improvement processes in achieving the organisation's objectives. Their position, closely associated with the creation and delivery of products and services, means that they have an important responsibility in influencing the ongoing development of the organisation. At this level, work will normally be carried out within known routines, methods and procedures, and may also involve a number of complex or non-routine activities that require some discretion and judgement. Consider co-assessment with BSBFLM305C Support operational plan, BSBFLM312C Contribute to team effectiveness, BSBCUS301A Deliver and monitor a service to customers, BSBCMN311B Maintain workplace safety, and BSBFLM311C Support a workplace learning

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	environment.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Contribute to continuous improvement systems and processes	1.1. Actively encourage and support team members to participate are in decision making processes and to assume responsibility and exercise initiative 1.2. ***Communicate*** the organisation's ***continuous improvement processes*** to individuals and teams

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ELEMENT	PERFORMANCE CRITERIA
	1.3. Effectively utilise ***mentoring and coaching*** to ensure that individuals/teams are able to support the organisation's continuous improvement processes
2. Monitor and report on specified outcomes	2.1. Utilise the organisation's ***systems*** and ***technology*** to monitor team progress and to identify ways in which planning and operations could be improved 2.2. Apply continuous improvement techniques and processes to improve ***customer service***
3. Support opportunities for further improvement	3.1. Communicate ***agreed recommendations*** for improvements in achieving the business plan to team members 3.2. Document and use work performance to identify opportunities for further improvement 3.3. Maintain records, reports and recommendations for improvement within the organisation's systems and processes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- functional literacy skills to access and use workplace information
- research, analysis, interpretation and reporting skills
- monitoring and evaluation skills
- communication skills to:
  - gain the commitment of individuals and teams to continuous improvement
  - deal with people openly and fairly
  - use consultation skills effectively
- skills to consolidate opportunities for improvement
- coaching and mentoring skills to provide support to colleagues

Required knowledge

- legislation from all levels of government that affects business operation, especially in regard to occupational health and safety and environmental issues, equal

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REQUIRED SKILLS AND KNOWLEDGE

opportunity, industrial relations and anti-discrimination
• principles and techniques of:
  • continuous improvement systems and processes
  • benchmarking
  • best practice
• benefits of continuous improvement
• quality approaches which the organisation may implement
• methods that can be used in continuous improvement
• barriers to continuous improvement
• recording, reporting and recommendation processes to facilitate continuous improvement applied within the organisation

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • examples of actions taken by the candidate to support continuous improvement including: • use of work performance to identify improvement • adjusted plans to reflect changes • effective communication to all stakeholders • use of technology to monitor operational progress • application of suitable recordkeeping processes.
Context of and specific resources for assessment	Assessment must ensure: • access by the learner and trainer to appropriate documentation and resources normally used in the workplace • that this unit is assessed in the workplace or in a closely simulated work environment.
Method of assessment	A range of assessment methods should be used to assess skills and knowledge. The following examples are appropriate for this unit:

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EVIDENCE GUIDE	

	• Direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate
	• Review of records supporting the organisation's continuous improvement systems and processes, such as:
	  • contributions to organisational policies and procedures
	  • contributions to procedures and policies for dealing with continuous improvement processes, and related codes of conduct
	  • actions taken to address information collection, retrieval and use in the workplace
	  • actions taken to address issues and problems within work team
	  • actions taken to address methods of reporting information
	  • learning and development plans for team members
	  • materials developed for coaching, mentoring and training
	  • induction programs developed and/or delivered
	  • actions taken to address internal and external information management issues
	  • reviews of people management
	  • advice and input into management decisions related to continuous improvement
	  • records of people management lessons learned.

Guidance information for assessment	This unit should be assessed with other frontline management units taken as part of this qualification, as applicable to the candidate's leadership role in a work team, and as part of a holistic assessment activity.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating

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RANGE STATEMENT	
conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to occupational health and safety (OHS) and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice.
OHS considerations may include:	• provision of information about OHS legislative requirements and guidelines, and the organisation's OHS policies, procedures and programs • participation in the regular update of OHS systems and procedures • implementation of the continuous improvement processes of the OHS management system • changes to work practices, procedures and the working environment which impact on OHS • organisation's responsibilities to customers and suppliers.
Methods used to ***communicate*** with individuals and team may include:	• verbal, written or electronic communications • on-the-job mentoring and coaching.
Continuous improvement processes may include:	• policies and procedures which allow an organisation to systematically review and improve the quality of its products, services and procedures • cyclical audits and reviews of workplace, team and individual performance • seeking and considering feedback from a range of stakeholders • modifications and improvements to systems, processes, services and products • evaluations and monitoring of effectiveness.
Mentoring and coaching may refer to:	• teaching another member of the team, usually focusing on a specific work task or skill • providing feedback, support and

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RANGE STATEMENT	
	encouragement on a range of matters • providing assistance with problem solving.
Systems may include:	• organisation policies and procedures • web based communication devices • attendance at forums, meetings • newsletters and reports.
Technology may include:	• computerised systems and software such as databases, project management and word-processing • telecommunications devices • any other technology used to carry out work roles and responsibilities.
Customer service may be:	• internal or external, to existing or new clients • identifying needs and priorities in delivering a service to customers • understanding of different levels of customer satisfaction.
Agreed recommendations may be:	• identified improvements arising from the continuous improvement process • determined in accordance with organisational policies and procedures

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and leadership - Frontline Management

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBFLM311C Support a workplace learning environment

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively encourage and support a learning environment. Particular emphasis is on participation in processes to facilitate and promote learning and to monitor and improve learning performance. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Frontline managers have a prominent role in encouraging and supporting the development of a learning environment in which work and learning come together. At this level, work will normally be carried out within known routines, methods and procedures, and may also involve a number of complex or non-routine activities that require some discretion and judgement. This unit is related to BSBLED401A Develop teams and individuals.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Encourage a learning environment	1.1. Encourage and support workplace ***learning opportunities*** 1.2. Implement ***learning plans*** as an integral part of individual and team performance plans 1.3. Implement learning plans to reflect ***diversity of needs*** and learning opportunities 1.4. Encourage individual and team access to, and participation in, learning opportunities 1.5. Liaise effectively with ***training and development specialists*** to contribute to learning opportunities which enhance individual, team and organisational performance
2. Encourage and promote learning of team and individuals	2.1. ***Promote a learning culture*** within the team and organisation 2.2. Support ***coaching and mentoring*** for the

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ELEMENT	PERFORMANCE CRITERIA
	development of workplace knowledge, skills and attitudes 2.3. Encourage team members to assess own competencies, and to identify own ***learning and development needs*** 2.4. Share the benefits of learning with others in the team and organisation 2.5. Provide recognition and feedback for ***workplace achievement*** in a timely and appropriate manner
3. Identify opportunities for improvement	3.1. Monitor the performance of individuals and teams to determine the type and extent of required work-based support 3.2. Gather feedback from individuals and teams to identify opportunities for improving future learning arrangements 3.3. Negotiate adjustments with training and development specialists to improve the efficiency and effectiveness of learning 3.4. Record, document and report learning outcomes in accordance with the organisation's systems and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- coaching and mentoring skills to support learning
- communication skills to:
  - gain the trust and confidence of colleagues
  - deal with people openly and fairly
  - use consultation skills effectively
- culturally appropriate communication skills to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- functional literacy skills to access and use workplace information
- skills in facilitating learning, including:
  - identifying learning needs

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REQUIRED SKILLS AND KNOWLEDGE
• developing learning plans • selecting and using work activities to create learning opportunities • establishing a workplace conducive to learning • negotiating learning arrangements with training and development specialists • encouraging colleagues to share their knowledge and skills • evaluating the effectiveness of learning
Required knowledge

• principles and techniques of:
  • adult learning
  • a learning environment and learning culture
  • work based learning
  • structuring learning
  • coaching and mentoring
• relevant legislation from all levels of government that may affect business operation, especially in regard to:
  • occupational health and safety
  • environmental issues
  • equal opportunity and anti-discrimination
  • industrial relations

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • liaising with stakeholders, especially members of the work team, to develop, promote and maintain a workplace learning environment • developing learning plans and arranging learning opportunities in line with identified needs • compiling and interpreting data about learning arrangements and outcomes in accordance with

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EVIDENCE GUIDE	
	organisational requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge and understanding of workplace learning principles and organisational procedures and policies for applying learning systems • presentation of examples of actions taken by the candidate to support a workplace learning environment • review of materials developed for coaching, mentoring and training.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCUS301A Deliver and monitor a service to customers • BSBFLM305C Support operational plan • BSBFLM312C Contribute to team effectiveness • BSBCMN311B Maintain workplace safety • BSBWOR301A Organise personal work priorities and development.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and

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RANGE STATEMENT	
regional contexts) may also be included.	

Learning opportunities may include:	• action learning
	• coaching
	• exchange/rotation
	• induction
	• mentoring
	• shadowing
	• short courses
	• structured learning activities conducted outside and within the workplace such as:
	  • accredited training through an independent organisation such as a State OHS authority
	  • training through an RTO leading to a nationally recognised Australian Qualifications Framework (AQF) qualification or Statement of Attainment, for example through a traineeship or Australian Apprenticeship
	• workplace learning activities, that may also contribute to a recognised credential, such as:
	  • workshops.

Learning plans may include:	• codes of conduct • key performance indicators (KPI) • negotiated agreement with individual • OHS requirements • performance standards • team competencies • team roles and responsibilities • work outputs and process.
Diversity of needs may include:	• different learning needs that relate to social, cultural and other types of workplace diversity, such as the need for varied communication styles and approaches.
Training and development specialists may be:	• internal or external.
Promoting a learning culture may include:	• encouraging learning and sharing of skills and knowledge across the work team and the wider organisation in order to develop competencies of team members and the team • informally supporting and recognising

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RANGE STATEMENT	
	learning achievements and sharing success stories • promoting participation and learning opportunities • using formal processes to reward training participation in line with organisational processes • utilising workplace activities as opportunities for learning.
Coaching and mentoring may refer to:	• providing assistance with problem solving • providing feedback, support and encouragement on a range of matters • teaching another member of the team, usually focusing on a specific work task or skill.
Learning and development needs may include:	• developmental learning, for example the learning required to progress through an organisation and take on new tasks and roles • gaps between the competencies held by the employee and the skills and knowledge required to effectively undertake workplace tasks.
Workplace achievement may refer to:	• achievements of set goals and performance outcomes by the work team and/or individuals.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Frontline Management

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Co-requisite units

Co-requisite units		

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BSBFLM312C Contribute to team effectiveness

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This specifies the outcomes required to by frontline managers to contribute to the effectiveness of the work team. It involves planning with the team to meet expected outcomes, developing team cohesion, participating in and facilitating the work team, and communicating with the management of the organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Frontline managers have a key role in developing efficient and effective work teams within the context of the organisation. They play a prominent part in motivating, mentoring, coaching and developing team cohesion by providing leadership for the team and forming the bridge between the management of the organisation and the team members. At this level, work will normally be carried out within known routines, methods and procedures, and may also involve a number of complex or non routine activities that require some discretion and judgement.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Contribute to team outcomes	1.1. Consult team members to identify ***team purpose***, ***roles***, ***responsibilities***, ***goals***, ***plans and objectives*** 1.2. Support team members to meet expected outcomes
2. Support team cohesion	2.1. Encourage team members to participate in the planning, decision making and operational aspects of the work team to their level of responsibility 2.2. Encourage team members to take responsibility for their own work and to assist each other in undertaking required roles and responsibilities 2.3. Provide ***feedback*** to team members to encourage, value and reward team members' efforts and contributions 2.4. Identify and address issues, concerns and problems identified by team members to ***relevant persons*** as

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ELEMENT	PERFORMANCE CRITERIA
	required
3. Participate in work team	3.1. Actively encourage and support team members to participate in team activities and communication processes and to take ***responsibility for their actions***
	3.2. Support the team to identify and resolve problems which impede its performance
	3.3. Utilise own contribution to work team to serve as a role model for others and enhance the organisation's image within the work team, the organisation and with clients/customers
4. Communicate with management	4.1. Maintain open ***communication*** with ***line manager*/*management*** at all times
	4.2. Communicate information from line manager/management to the team
	4.3. Communicate ***unresolved issues*** to line manager/management and follow-up to ensure action is taken in response to these matters

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

Required skills

- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- communication skills, including listening
- basic training skills, including mentoring and coaching
- planning and organising skills
- problem solving skills
- attributes:
  - empathic
  - communicative
  - self aware
  - supportive
  - trusting

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REQUIRED SKILLS AND KNOWLEDGE
• open • flexible • accommodating • initiating • loyal • fair • adaptable
Required knowledge

Required knowledge
• relevant legislation from all levels of government that affects business operation, especially in regard to occupational health and safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
• organisational policies and procedures
• organisational goals, objectives and plans at both tactical and strategic levels
• organisational structure including organisational chart
• learning and development options available within and through organisation
• a general understanding of the principles and techniques of:
  • group dynamics and processes
  • motivation
  • planning
  • negotiation
• individual behaviour and difference

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrate leadership in contributing to team plans • lead and facilitate teamwork • actively communicate with management • manage communication within the team

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EVIDENCE GUIDE	
	• induct new team members • implement performance management system • handle problems
Context of and specific resources for assessment	Assessment must ensure: • that this unit can be assessed in the workplace or in a closely simulated work environment • access by the learner and trainer to appropriate documentation and resources normally used in the workplace • where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment • that examples of actions taken by candidate to contribute to team effectiveness are provided

Method of assessment	A range of assessment methods should be used to assess skills and knowledge. The following examples are appropriate for this unit:
	• Direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate
	• Records produced from working in a team, such as:
	  • reports
	  • minutes or records of meetings
	  • work journals or diaries
	  • learning and development plans developed with team members
	  • records of actions taken to address issues raised by team members

Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating

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RANGE STATEMENT	
conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legislation, codes and national standards relevant to the workplace may include:	• award and enterprise agreements and relevant industrial instruments • relevant legislation from all levels of government that affects business operation, especially in regard to occupational health and safety (OHS) and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant industry codes of practice
OHS considerations may include:	• provision of information about OHS legislative requirements, guidelines and the organisation's OHS policies, procedures and programs • training of all employees in health and safety procedures • participation in the regular update of OHS systems and procedures • changes to work practices, procedures and the working environment which impact on OHS
Team purpose, ***roles***, ***responsibilities***, ***goals***, ***plans and objectives*** may include:	• goals for individuals and the work team • expected outcomes and outputs • individual and team performance plans and Key Performance Indicators (KPIs) • action plans, business plans and operational plans linked to strategic plans • OHS responsibilities
Feedback may refer to:	• communication of ideas and thoughts which focus on specific tasks, outcomes, decisions, issues or behaviours • formal/informal gatherings between team members where there is discussion on work-related matters
Relevant persons may include:	• frontline manager's direct superior or other management representatives • colleagues • designated personnel e.g. safety officer
Responsibility for their actions	• individuals and teams • individual and joint actions

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RANGE STATEMENT	
may involve:	
Communication may include:	• verbal, written or electronic communication • face-to-face • formal/informal interaction
Line manager*/*management may refer to:	• frontline manager's direct superior or other management representatives
Unresolved issues may include:	• issues, concerns and tensions • problems related to work roles and responsibilities • grievances and complaints • any matters affecting workplace relationships and team cohesion

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Frontline Management services

Co-requisite units

Co-requisite units		

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BSBFRA301B Work within a franchise

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to work within a franchise to contribute to the successful operation of the business within a framework of compliance requirements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to staff working in franchised businesses. These staff may be in a broad range of roles, such as retail, trade or hospitality.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Clarify requirements for working within a franchise	1.1. Determine ***role and responsibilities*** as an employee within a franchise 1.2. Clarify role and responsibilities with supervisor, line manager and/or owner, as appropriate 1.3. Evaluate own skills to determine training needs to meet role and responsibilities within franchise 1.4. Seek assistance from supervisor/line manager/owner to evaluate training needs and to meet these identified needs 1.5. Request and negotiate any ***reasonable adjustments***
2. Clarify own contribution to meeting compliance requirements	2.1. Consult with supervisor/line manager/owner to determine ***compliance requirements*** falling within own role and responsibilities 2.2. Determine work plan and ensure scheduled actions to meet compliance requirements are included in this plan 2.3. Undertake required ***audits***, ***checks and associated tasks*** as per schedule 2.4. Seek ***advice*** as required to resolve difficulties arising in performing scheduled tasks 2.5. Accurately complete workplace records involved with meeting compliance requirements in a timely manner

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ELEMENT	PERFORMANCE CRITERIA
3. Review own contribution to franchise operations	3.1. Seek feedback from others to confirm that own role and responsibilities are being met 3.2. Review own work to ensure that required tasks are undertaken as per schedules and work plans 3.3. Identify and discuss with supervisor/line manager/owner any improvements in own work practices and those of others within the franchise 3.4. Willingly offer and provide assistance when requested by others within the franchise to meet their assigned roles and responsibilities

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to clarify roles and responsibilities
- organisational skills to ensure compliance with franchise requirements.

Required knowledge

- occupational health and safety (OHS) requirements:
  - specific to nature and type of franchise
  - specific issues such as manual handling, machine guarding and hazardous substances
- other legislation, codes of practice and national standards that apply to own work in a general way, for example:
  - fire safety regulations
  - codes of practice such as first aid and manual handling
  - Franchising Code of Conduct
- franchise specific obligations as per franchise agreement and as discussed with supervisor/line manager/owner.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated understanding of own role and responsibilities in the respective franchise operation • accurate record keeping for compliance with franchise requirements • techniques for supporting others to meet their roles and responsibilities in relation to the franchise requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to business documentation, manager and other personnel in workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of franchising arrangements and own role and responsibilities.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating

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RANGE STATEMENT	
conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Role and responsibilities may include:	• code of conduct or other set of expectations that contribute to maintaining brand image, homogeneity and identity • contributing to compliance requirements • responsibilities outlined in job description or other documentation or provided orally from manager
Reasonable adjustments may include:	• any adjustments required by legislation and government policy to ensure that all people are treated equally in their employment and training, as far as is reasonably possible
Compliance requirements may include:	• requirements under legislation. including OHS, the franchise agreement and local government by-laws
Audits, checks and associated tasks may include:	• cleaning and hygiene schedules • product testing • quality control • stocktaking and removal of out-of-date stock

Advice may include:	• information obtained from:
	  • documentation
	  • line manager and/or supervisor and/or owner
	  • material safety data sheets (MSDSs)
	  • online
	  • suppliers' documentation

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Franchising

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Co-requisite units

Co-requisite units		

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BSBFRA401B Manage compliance with franchisee obligations and legislative requirements

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to comply with obligations set out in the franchising agreement and with relevant legislative requirements specific to the type of franchise. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to franchisees who require a broad knowledge of franchisee obligations and legislative requirements and who use this knowledge to develop compliance strategies. Franchisors will have their needs met in this area by BSBFRA501B Establish a franchise operation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Determine franchisee obligations and legislative requirements	1.1. Identify ***obligations under franchising agreement*** 1.2. Identify relevant ***legislative requirements*** 1.3. Access codes of practice and material that interprets and explains obligations and legislative requirements 1.4. Clarify obligations and legislative requirements with franchisor and relevant ***government*** and licensing agencies
2. Develop strategies for compliance with franchisee obligations and legislative requirements	2.1. Analyse available information on obligations and legislative requirements to develop ***strategies*** for compliance 2.2. Check strategies with franchisor to determine suitability to operate franchise within obligations and legislative requirements 2.3. Use strategies to develop regular, cyclical ***compliance checks*** 2.4. Complete ***training*** to facilitate compliance requirements
3. Undertake scheduled compliance checks	3.1. Communicate compliance requirements to staff 3.2. Delegate compliance checks to relevant staff and provide training and support for staff to carry out these checks 3.3. Record timing and outcomes of compliance checks according to organisational requirements

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Identify instances of non-compliance from compliance checks
4. Act on identified instances of non compliance with franchisee obligations and legislative requirements	4.1. Determine courses of action to address instances of non-compliance 4.2. Seek assistance of franchisor or other relevant parties to address non-compliance 4.3. Take action to address non-compliance 4.4. Make checks to ensure non-compliance has been addressed 4.5. Monitor compliance in a specific area to ensure continuing compliance 4.6. Analyse reasons for non-compliance to guide future compliance

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- communication and negotiation skills to establish franchisee obligations
- problem-solving skills to address non-compliance
- research skills to access necessary information.

Required knowledge

- occupational health and safety (OHS) requirements:
  - specific to nature and type of franchise
  - generic to all workplaces
- other relevant legislation, codes of practice and national standards, for example:
  - legislation covering fire safety, employment of staff and anti-discrimination, dangerous goods, liquor licensing, food safety
  - Franchising Code of Conduct
- franchise specific obligations:
  - as per franchise agreement
  - as per updates and amendments to agreement over time
- auditing requirements

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REQUIRED SKILLS AND KNOWLEDGE
• penalties for non-compliance and context for franchisee obligations and legislative requirements.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • schedule of checks being undertaken associated with a broad statement of strategies to ensure compliance • compliance check schedule and examples of checks made • documented actions to address instances of non-compliance • demonstrated support to staff to assist with compliance • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of real franchisee agreements and related documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of action taken to address non-compliance • oral or written questioning to assess knowledge of franchisee arrangements • evaluation of strategies developed for compliance

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EVIDENCE GUIDE	
	• review of documentation recording timing and outcomes of compliance checks.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Obligations under franchising agreement may include:	• area of operations or limits to region or territory • fees and pricing structures • fees paid to franchisor • financial controls • franchise corporate image requirements and branding • limits on trading of other products and services that are outside franchise operations • merchandising requirements • quality assurance requirements • reporting of income, sales or turnover • stock control and inventory requirements, and reporting of this information
Legislative requirements may include:	• Australian Taxation Office requirements, including requirements to register as a business and obtain an (Australian Business Number) ABN • Dangerous Goods Act requirements • fire regulations • food safety requirements • Liquor Licensing Act requirements • local government planning and land use zoning regulations

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RANGE STATEMENT	
	• OHS requirements • other legislative requirements specific to the nature and type of franchise • relevant permits, licences and completion of training programs such as in safe food handling • requirements under employment legislation
Government may include:	• commonwealth • local government • state/territory
Strategies may be:	• broad statements of requirements for compliance • used to develop specific work procedures and compliance checks
Compliance checks may be:	• continuous, daily, weekly, monthly as required to ensure compliance • logged in specific logbook or checked against checklists and filed as required • undertaken by franchisee or staff delegated with specific tasks
Training may include:	• a cyclical schedule (such as yearly refresher courses and product knowledge workshops) • legislative requirements such as first aid, OHS, food handling • specifications in the initial franchise agreement

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Franchising

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Co-requisite units

Co-requisite units		

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BSBFRA402B Establish a franchise

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish a franchise from the initial research phase through to finalising a franchising agreement with the franchisor and opening the franchise for business. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to potential franchisees who will operate under formal franchising agreements and focuses on the planning aspects of the establishment of a franchise.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify opportunities for establishing a franchise	1.1. Research and identify franchising opportunities 1.2. Determine own interests and skills to assess suitability for identified opportunities 1.3. Determine ***requirements for establishing a specific franchise*** 1.4. Research and check viability and business record of franchisor in prospective franchise 1.5. Enter into ***negotiations*** with a franchisor to establish a franchise
2. Complete business plan	2.1. Access business plan proforma, as appropriate 2.2. Consult franchisor and ***others*** in process of developing business planning documents 2.3. Research and determine ***financing options*** 2.4. Finalise financial planning for franchise 2.5. Undertake market analysis for franchise opportunity and complete marketing plan 2.6. Research and determine needs for premises in appropriate area 2.7. Compile relevant information into business plan
3. Identify and address learning needs	3.1. Determine required skills and knowledge to manage a franchise, and identify gaps for self and others 3.2. Seek assistance to assess and address learning needs

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ELEMENT	PERFORMANCE CRITERIA
	and document these in the form of a learning plan 3.3. Determine training required by franchisor of a franchisee 3.4. Undertake learning plan and required training programs
4. Finalise agreements	4.1. Complete finance agreements 4.2. Access legal advice as required 4.3. Finalise and sign off franchising agreement 4.4. Obtain required ***permits*** for franchise operation 4.5. Finalise ***contracts and agreements*** with ***third parties***
5. Prepare for opening of franchise	5.1. Obtain physical and human resources required to manage franchise 5.2. Undertake marketing activities associated with opening the franchise 5.3. Open the franchise for business

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • research and analysis skills to conduct and plan market research • planning skills to meet learning needs • problem-solving skills to address issues which may arise during franchise establishment.
Required knowledge

• occupational health and safety (OHS) requirements:
  • specific to nature and type of franchise
  • generic to all workplaces
  • specific to own safety such as manual handling
• legislation, codes of practice and national standards, for example:
  • Franchising Code of Conduct
  • legislation covering fire safety, OHS, employment of staff, company law,

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REQUIRED SKILLS AND KNOWLEDGE
anti-discrimination and fair trading • required permits (under commonwealth, state/territory and local government regulations and legislation) • franchisee specific obligations as per franchise agreement.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • determining own suitability for the franchise • completing a business plan • identifying and planing learning needs • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of real franchisee agreements and related documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of business plan • analysis of responses to case studies and scenarios • evaluation of documented learning plan • observation of presentations on financing options • oral or written questioning to assess knowledge of franchisee arrangements

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EVIDENCE GUIDE	
	• observation of performance in role plays.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Requirements for establishing a specific franchise may include:	• availability of finance • availability of franchise opportunity • franchisor specific requirements • own skills and knowledge
Negotiations may include:	• fee structure for franchise operation • financing options • franchisee obligations • franchisor requirements and expectations • reasonable adjustments to workplace, equipment or processes to facilitate operation of the franchise • site selection for franchise
Others may include:	• accountant • family members • franchisor staff • legal advisor • other franchisees already operating franchises • own network • personal research
Financing options may include:	• arrangements with franchisor or third party interest • loan from family members • loan from financial institution • mortgage of existing property or sale of assets

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RANGE STATEMENT	
Permits may include:	• dangerous goods • fire safety and OHS • local government permits • other commonwealth, state/territory legislation • specific business operations such as liquor licence
Contracts and agreements may include:	• lease or purchase of premises • motor vehicles • industry specific tools, plant and equipment • IT and office equipment
Third parties may include:	• property owner of site separate to franchisor • silent partners or commercial backers

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Franchising

Co-requisite units

Co-requisite units		

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BSBFRA403B Manage relationship with franchisor

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage the business relationship with the franchisor and oneself as the franchisee. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to franchisees who need to develop good working relationships with their franchisor within the Franchising Code of Conduct. BSBFRA504B Manage relationships with franchisees, is the relevant unit for franchisors.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish relationship with franchisor	1.1. Identify the ***franchisor's representative/s or liaison person/s*** 1.2. Identify ***communication channels*** with the franchisor's representative/s or liaison person/s 1.3. Establish ***schedule of contact*** with the franchisor's representative/s or liaison person/ 1.4. Hold initial meeting with the franchisor's representative/s or liaison person/s to initiate ongoing relationship 1.5. Ensure participation in the franchisee advisory council meetings and relevant activities
2. Determine services available from franchisor	2.1. Consult with the franchisor's representative/s or liaison person/s to determine the range of ***services available through the franchisor*** 2.2. Establish schedule for accessing services of the franchisor 2.3. Access services available through the franchisor according to schedule and as needs arise in the course of business operations 2.4. Maintain currency of information relating to services available through the franchisor
3. Implement strategies for meeting	3.1. Identify ***franchisee financial obligations*** to the franchisor

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ELEMENT	PERFORMANCE CRITERIA
franchisor financial obligations	3.2. Develop and implement strategies and procedures to meet franchisee financial obligations 3.3. Undertaken planning to facilitate ***ongoing management of franchise***
4. Resolve disputes with franchisor	4.1. Identify disputes with the franchisor and enter into negotiations with the franchisor's representative/s or liaison person/s in line with complaints handling procedure as described in the Franchising Code of Conduct 4.2. Seek assistance of third parties or mediators to facilitate resolution of disputes arising with the franchisor and in line with the complaints handling procedure 4.3. Resolve disputes and document courses of agreed action 4.4. Implement agreed courses of action to resolve disputes 4.5. Use lessons learned from disputes to guide future business operations and to facilitate positive relationships with the franchisor

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- communication and negotiation skills to resolve disputes
- problem-solving skills to address disputes arising in the course of business operations.

Required knowledge

- occupational health and safety (OHS) requirements:
  - specific to nature and type of franchise
  - generic to all workplaces
  - specific to own safety such as manual handling
- legislation, codes of practice and national standards, for example:

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REQUIRED SKILLS AND KNOWLEDGE
• Franchising Code of Conduct • legislation covering fire safety, OHS, employment of staff, company law, anti-discrimination and fair trading • required permits (under commonwealth, state/territory and local government regulations and legislation) • franchise specific obligations as per franchise agreement, specifically financial obligations.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • implementing processes to manage the relationship between franchisor and self • identifying and resolving disputes • financial planning to meet franchisor requirements • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to business documentation • access to feedback from franchisor • access to an actual workplace or simulated environment • access to equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of strategies and procedures implemented to meet franchisee financial obligations

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EVIDENCE GUIDE	
	• analysis of responses to case studies and scenarios • observation of presentations • oral or written questioning to assess knowledge of franchising arrangements • review of documented courses of agreed action taken to resolve disputes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Franchisor's representative*/*s or liaison person*/*s may include:	• franchisor's appointed representative • specialist personnel within franchisor organisation including financial advisers, training personnel and marketing advisers
Communication channels may include:	• email address • meeting schedules • mobile and office based telephone numbers • other emergency contact channels • pager number • workshops for franchisees
Schedule of contact may include:	• occasional visits • regular meetings • training schedules and franchisee network meetings • visits by representative/s
Services available through the franchisor may include:	• equipment repair and replacement • financial advise • IT support • market intelligence • marketing and promotional activities

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RANGE STATEMENT	
	• product updates • purchasing of stock • training programs
Franchisee financial obligations may include:	• payment schedules • fixed price • percentage of turnover • percentage of income
Ongoing management of franchise may include:	• planning for life of agreement • planning for extinction of agreement

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Franchising

Co-requisite units

Co-requisite units		

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BSBFRA404B Manage a multiple site franchise

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage a multiple site franchise. A multiple site franchise refers to an agreement between a franchisor and a franchisee for the operation of the franchise across more than one site or region. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to franchisees operating under formal franchising agreements over multiple sites. The unit BSBFRA502B Manage a franchise operation applies to franchisors managing multiple franchisees.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan for managing multiple site franchise	1.1. Determine strategies for managing multiple site franchise operations in consultation with the franchisor and within the franchisor's multiple site policy 1.2. Document policies and procedures to support strategies for managing a multiple site franchise 1.3. Determine and obtain ***physical resources*** to manage a multiple site franchise 1.4. Determine and document ***practices*** to manage a multiple site franchise 1.5. Design duplicate management systems for each site of operation under a multiple site operation
2. Appoint staff for multiple site franchise	2.1. Select and recruit staff for a multiple site franchise 2.2. Determine and communicate to all ***relevant parties***, responsibilities and roles of supervisor or manager of site 2.3. Determine, document as an action plan and implement learning needs of supervisors or managers
3. Implement plan for managing multiple site franchise	3.1. Communicate and clarify policies, procedures and practices to manage a multiple site franchise with supervisors or managers 3.2. Develop a monitoring plan for management of a multiple site franchise

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ELEMENT	PERFORMANCE CRITERIA
	3.3. Delegate tasks to supervisors or managers and follow-up to ensure completion 3.4. Develop networks with other franchisees and multiple site operators to inform best practice for multiple site operation 3.5. Develop a review process for evaluating effectiveness and efficiency of management of a multiple site franchise 3.6. Design and implement ***schedule of activities*** to manage a multiple site franchise
4. Monitor multiple site franchise	4.1. Monitor and implement plan for managing a multiple site franchise 4.2. Seek feedback from franchisor on effectiveness and efficiency of management of a multiple site franchise 4.3. Identify and act upon required ***interventions*** from monitoring process 4.4. Provide feedback to managers or supervisors to guide efficient and effective management of franchise sites 4.5. Identify ongoing training needs for managers or supervisors and facilitate required training
5. Review management of multiple site franchise	5.1. Implement review process for evaluating effectiveness and efficiency of management of a multiple site franchise 5.2. Seek feedback and information from franchiser to inform review process 5.3. Identify improvements in management of sites from review process 5.4. Identify, communicate and implement improvements to managers or supervisors 5.5. Monitor effectiveness of improvements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse

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REQUIRED SKILLS AND KNOWLEDGE
backgrounds and people with diverse abilities • communication and negotiation skills to resolve disputes • problem-solving skills to address disputes arising in the course of business operations • planning skills to manage multiple sites.
Required knowledge

• occupational health and safety (OHS) requirements:
  • specific to nature and type of franchise
  • generic to all workplaces
  • specific to own safety such as manual handling
• legislation, codes of practice and national standards, for example:
  • Franchising Code of Conduct
  • legislation covering fire safety, OHS, employment of staff, company law, anti-discrimination and fair trading
  • required permits (under commonwealth, state/territory and local government regulations and legislation)
• franchise specific obligations as per franchise agreement.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • implementing and reviewing strategy for all sites • documenting and monitoring plans for all sites • documenting interventions for all sites • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to business documentation • access to feedback from franchisor and managers or supervisors

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EVIDENCE GUIDE	
	• access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • oral or written questioning to assess knowledge of franchising arrangements • review of documentation outlining practices used to manage a multiple site franchise • evaluation of documented training needs for managers or supervisors.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Physical resources may include:	• access to email • courier systems • other physical resources that facilitate communication between sites and central operations unit • phone, fax and other electronic communication equipment
Practices may include:	• meeting schedules • programmed visits • regular reporting via paper

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RANGE STATEMENT	
	• using electronic bulletin boards and other means of communication for reporting purposes • workshops, product knowledge seminars, conferences and professional development programs
Relevant parties may include:	• employed staff • franchisor representatives • managers or supervisors
Schedule of activities may include:	• business activity • human resource information • problems arising during course of business operations • quality assurance issues, and test sampling and results • regular and cyclical reporting • stock levels and inventory control • training activity • turnover, income or expenses and other financial information
Interventions may include:	• discipline of managers or supervisors • increased physical and human resources • information provided • seeking support from franchisor and accessing services available through franchisor • temporary assistance • training

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Franchising

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Co-requisite units

Co-requisite units		

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BSBFRA501B Establish a franchise operation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish a franchising operation from an existing business, chain of businesses or planned concept. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to franchisors with a well established, sound theoretical knowledge base in franchising who are proficient in using a range of specialised technical and managerial techniques to plan and establish a franchise operation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Research feasibility of establishing a franchise operation	1.1. Undertake research into franchising models 1.2. Analyse existing business or planned concept to determine opportunity for expansion into franchise operation 1.3. Undertake market research on product or service 1.4. Undertake financial feasibility of proposed franchise operation 1.5. Seek assistance with feasibility study from ***specialists and relevant parties*** as required 1.6. Complete business plan for franchise operation 1.7. Complete marketing plan for franchise operation
2. Plan for establishment of a franchise operation	2.1. Secure financial backing for franchise operation 2.2. Define franchise concept in terms of ***roles and responsibilities of franchisor and franchisees*** 2.3. Seek advice from specialists and relevant parties to complete documentation of franchising concept 2.4. Develop and document procedures to guide ***franchisees'*** and franchisor's operations 2.5. Determine ***human and physical resources*** required to commence franchise operation 2.6. Develop, obtain agreement on and implement recruitment strategies for potential franchise

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ELEMENT	PERFORMANCE CRITERIA
3. Implement plan for establishment of a franchise operation	3.1. Undertake marketing of franchise operation 3.2. Identify franchisees to commence franchise operation and formalise agreements 3.3. Assist franchisees in developing a business plan and a marketing plan 3.4. Obtain physical and human resources to implement franchise operation 3.5. Establish ***operational unit*** to support and coordinate franchise operation 3.6. Develop and implement monitoring process for managing franchise operation
4. Review implementation process	4.1. Develop and implement review process for implementation of franchise operation 4.2. Identify improvements in franchising operation and associated management processes 4.3. Identify and implement improvements and monitor for effectiveness

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- marketing skills to promote new franchises
- problem-solving skills to resolve issues in commencement of operations and new franchises.

Required knowledge

- occupational health and safety (OHS) requirements specific to the nature and type of franchising operations
- legislation, codes of practice and national standards, for example:
  - legislation specific to nature and type of franchising operations
  - company law, fair trading and anti-discrimination
  - Franchising Code of Conduct
- financing options

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REQUIRED SKILLS AND KNOWLEDGE
• franchising operations.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • carrying out initial research into feasibility of the franchise operation • documenting a business plan, through to implementing the plan • establishing an agreement with franchisees which specifies roles and responsibilities of both parties • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to business documentation • access to feedback from franchisees • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of financial feasibility study, marketing plan and business plan • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of franchising arrangements

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EVIDENCE GUIDE	
	• evaluation of implemented recruitment strategies.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBFRA502B Manage a franchise operation.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Specialists and relevant parties may include:	• accountants, legal representatives, financial planners and financial institution representatives, business planning specialists, marketing specialists and franchising consultants • chambers of commerce • Franchise Council of Australia
Roles and responsibilities of franchisor and franchisees may include:	• agreement between franchisor and franchisees • conditions for franchises • services provided to franchises
Franchisees may include:	• chain of outlets • existing businesses • interested parties including a trial sample of franchises
Human and physical resources may include:	• communications equipment • office premises • software and hardware • specialist services through outsourcing, contracting and consultancy • staff • vehicles
Operational unit may include:	• home-based site or other location such as leased or owned property

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RANGE STATEMENT	
	• office location staffed with required personnel and equipped to service and support franchisees

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Franchising

Co-requisite units

Co-requisite units		

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BSBFRA502B Manage a franchise operation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage a franchise operation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to franchisors managing an existing franchise operation to support franchisees and meet franchisor obligations under the particular franchising agreement entered into with those franchisees.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish procedures for managing a franchise operation	1.1. Determine obligations of both parties under franchising agreement 1.2. Develop procedures for ensuring compliance with ***franchising obligations*** and ***legislative requirements*** 1.3. Develop and communicate to franchises ***reporting requirements*** for franchisees
2. Implement procedures for managing a franchise operation	2.1. Implement procedures for franchises to ensure compliance with franchising obligations and legislative requirements 2.2. Identify instances of non-compliance and act upon them in conjunction with franchises 2.3. Monitor reports from franchises for completeness, accuracy and timeliness of submission 2.4. Identify potential disputes with franchises and take action to resolve potential disputes before they eventuate 2.5. Resolve disputes that eventuate and reach an agreed settlement within established procedures as documented in the Franchising Code of Conduct
3. Review a franchise operation	3.1. Use monitoring of franchises to inform review process for franchise operation 3.2. Identify improvements in franchise operation and management of franchises from monitoring

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ELEMENT	PERFORMANCE CRITERIA
	franchises' business operations 3.3. Make recommendations to improve the effectiveness of the franchise operation and individual franchises

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • marketing skills to promote new franchises • problem-solving skills to resolve issues in commencement of operations and new franchises • communication and negotiation skills to address potential disputes • analysis skills to monitor and review franchise performance.
Required knowledge

• legislation, codes of practice and national standards relating to occupational health and safety (OHS), company law, fair trading, anti-discrimination and other areas specific to the franchise operation
• Franchising Code of Conduct
• franchise specific obligations:
  • as per franchise agreement
  • as per updates and amendments to the agreement over time.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and	Evidence of the following is essential:

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EVIDENCE GUIDE	
evidence required to demonstrate competency in this unit	• documenting franchising agreement, including franchisee obligations • taking action to ensure franchisee compliance with obligations and addressing non-compliance • improving franchise operations based on feedback and monitoring activities • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to business documentation • access to feedback from franchisees • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of procedures implemented for franchises to ensure compliance with franchising obligations and legislative requirements • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of franchising arrangements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBFRA501B Establish a franchise operation.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised

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RANGE STATEMENT	
wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Franchising obligations may include:	• fees and pricing structures • franchise corporate image requirements and branding • merchandising requirements • quality assurance requirements • reporting of income, sales and turnover • stock control and inventory requirements, and reporting of this information
Legislative requirements may include:	• Australian Taxation Office requirements, including requirements to register as a business and obtain an Australian Business Number (ABN) • Dangerous Goods Act requirements • fire regulations • food safety requirements • Liquor Licensing Act requirements • local government planning and land use zoning regulations • OHS requirements • other legislative requirements specific to the nature and type of franchise • relevant permits, licences and completion of training programs such as in safe food handling • requirements under employment legislation
Reporting requirements may include:	• accident and incident reporting and recording • customer numbers and turnover • income, expenditure and other financial reports • stock levels and inventory control

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and Leadership - Franchising

Co-requisite units

Co-requisite units		

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BSBFRA503B Manage establishment of new sites or regions

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage the establishment of new sites or regions within an existing franchise operation and select new operators for existing franchises. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a well established, sound theoretical knowledge base in franchising who identify opportunities for new sites or regions and assist potential franchisees in commencing operations. The unit also applies to the selection of new franchisees for existing sites or regions where a new operator is required to take over the franchise.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify opportunities for new franchise sites or regions	1.1. Access franchise organisation's ***strategic plan for expansion of franchise operation*** to determine opportunities for new sites or regions 1.2. Make analysis from closures of existing sites or regions and other ***industry data*** to identify opportunities for new sites or regions 1.3. Undertake market research to identify opportunities for new sites or regions 1.4. Obtain agreement on new sites and regions from senior management as relevant 1.5. Confirm and document opportunities for new sites or regions within franchisor's policies
2. Select new franchisees	2.1. Supply ***applicants for new sites or regions*** with ***requirements for establishing a franchise*** 2.2. Check each applicant's suitability and ability to meet franchisor's requirements in consultation with applicants and franchise operation's management 2.3. Evaluate each ***applicant's business planning documents*** for suitability
3. Assist potential franchisees with	3.1. Assist potential franchisees with completion of

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ELEMENT	PERFORMANCE CRITERIA
establishing new franchise	business and marketing plans 3.2. Clarify issues raised in relation to operation of the franchise with potential franchisees 3.3. Assist potential franchisees with obtaining required ***permits***, site selection and financing options 3.4. Communicate and clarify with potential franchisees, marketing or other cooperative funds, intellectual property rights and rights to client database 3.5. Determine ***physical and human resources*** required for commencement of franchise in conjunction with potential franchisee
4. Formalise agreement with new franchisee/s	4.1. Make checks to ensure franchisee/s meet all ***requirements for entering into franchise agreement*** 4.2. Complete agreement with new franchisee/s and obtain necessary signatures 4.3. Determine date for commencement of franchise/s
5. Assist franchisee/s in opening new franchise	5.1. Assist franchisee/s with obtaining required physical and human resources to commence operations 5.2. Assist franchisee/s with obtaining required ***products*** to commence operations 5.3. Determine and implement responsibilities of franchisor as per franchise agreement 5.4. Provide assistance to franchisee/s to determine and implement strategies and processes to meet ***franchisee obligations*** and ***legislative requirements*** as per franchise agreement and to manage the franchise 5.5. Monitor ability to commence franchise operations on due date in conjunction with franchisee/s 5.6. Determine ***training*** needs of franchisee/s and facilitate required training 5.7. Resolve problems arising in setting up franchise to commence business operations in conjunction with franchisee/s 5.8. Commence operations of new site or region within specified timeframes and within parameters set down by franchisor

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • communication and negotiation skills to secure new franchisees and sites • problem-solving skills to resolve issues in establishment of formal agreements with franchisees.
Required knowledge

• legislation, codes of practice and national standards relating to occupational health and safety (OHS), company law, fair trading, anti-discrimination and other areas specific to the franchise operation
• Franchising Code of Conduct
• franchise specific obligations:
  • as per franchise agreement
  • as per updates and amendments to agreement over time.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • establishing a strategic plan for franchise expansion • providing advice and support to franchisees • completing an agreement with franchisees • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to business documentation • access to feedback from franchisees • access to an actual workplace or simulated

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EVIDENCE GUIDE	
	environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of market research to identify opportunities for new sites or regions • evaluation of applicant's business planning documents • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of franchising arrangements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBFRA501B Establish a franchise operation.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Strategic plan for expansion of franchise operation may include:	• geographic spread of franchises • limits of regions/sites • number of franchises • other criteria for establishing new sites or regions
Industry data may include:	• information and statistics from government departments and agencies

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RANGE STATEMENT	
	• reports and data from peak bodies
Applicants for new sites or regions may include:	• those opening a new site or region • those taking over an existing franchise
Requirements for establishing a franchise may include:	• capital or financial backing • franchise specific requirements • physical aptitude or fitness • receipt of disclosure document as specified in the Franchising Code of Conduct • skill levels or appropriate experience
Products may include:	• consumables • raw materials • stock
Applicant's business planning documents may include:	• business plan • financial plan • marketing plan • other planning documents
Permits may include:	• dangerous goods • fire safety and OHS • local government permits • other permits governed by commonwealth, state/territory legislation • specific business operations such as liquor licence
Physical and human resources may include:	• franchise specific equipment • IT and communications equipment • premises • products (consumables, raw materials, stock) • shop fittings/office furniture • staff • vehicles
Requirements for entering into franchise agreement may include:	• awareness and understanding of requirements as outlined in the Franchising Code of Conduct • competence • financial • health, fitness and aptitude • probity and police checks
Franchisee obligations may include:	• fees and pricing structures • franchise corporate image requirements and

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RANGE STATEMENT	
	branding • merchandising requirements • quality assurance requirements • recognition of identified territory to avoid encroachment of territory between franchisees • reporting of income, sales and turnover • stock control and inventory requirements, and reporting of this information
Legislative requirements may include:	• Australian Taxation Office requirements, including requirements to register as a business and obtain an Australian Business Number (ABN) • Dangerous Goods Act requirements • fire regulations • food safety requirements • Liquor Licensing Act requirements • local government planning and land use zoning regulations • OHS requirements • other legislative requirements specific to the nature and type of franchise • relevant permits, licences and completion of training programs such as in safe food handling • requirements under employment legislation
Training may be:	• scheduled on a cyclical basis (such as yearly refresher courses and product knowledge workshops) • specified in initial franchise agreement • required by legislation such as first aid

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and Leadership - Franchising

Co-requisite units

Co-requisite units		

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BSBFRA504B Manage relationships with franchisees

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage relationships with franchisees. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to franchisors with a well established, sound theoretical knowledge base in franchising who are proficient in using a range of specialised technical and managerial techniques to establish, manage and maintain relationships with franchisees.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish relationship with franchisees	1.1. Establish franchisee advisory council and ***other communication channels*** to link franchisee and franchisor to inform best practice and support franchisees and franchise operations 1.2. Determine and implement own role on franchisee advisory council 1.3. Determine and clarify role and responsibilities as franchisor's representative 1.4. Establish schedule of contact with franchisees 1.5. Hold initial meetings with franchisees to initiate ongoing relationships 1.6. Discuss and clarify roles and responsibilities of franchisor and franchisee with franchisees at initial meetings
2. Facilitate customer service provision to franchisees	2.1. Schedule and facilitate ***services to be provided to franchisees*** as per agreement 2.2. Negotiate and facilitate needs for additional services 2.3. Manage marketing or other cooperative funds according to documented agreements with franchisees 2.4. Resolve problems arising in service provision with franchisees in line with documented complaint handling procedures as specified in the Franchising

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ELEMENT	PERFORMANCE CRITERIA
	Code of Conduct 2.5. Maintain currency of information relating to services provided through franchisor
3. Provide advice to franchisees	3.1. Monitor business activity of franchisees 3.2. Provide specific advice to franchisees through ***required training*** 3.3. Clarify requests for advice from franchisees and provide appropriate responses 3.4. Undertake research to inform advice to be provided 3.5. Provide timely, accurate advice in a manner that promotes acceptance of that advice 3.6. Ensure follow up with franchisee to ensure advice is understood and appropriate responses are made by franchisee
4. Review management of relationship with franchisees	4.1. Monitor relationships with franchisees for customer satisfaction 4.2. Review strategies and practices to manage relationship with franchisees to identify improvements 4.3. Implement identified improvements in managing relationships with franchisees

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • business planning and management skills to provide customer service support to franchisees • communication and negotiation skills to establish and support relationships with franchisees • problem-solving skills to address issues in relationship with franchisees.
Required knowledge
• legislation, codes of practice and national standards relating to occupational health and safety (OHS), company law, fair trading, anti-discrimination and other areas

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REQUIRED SKILLS AND KNOWLEDGE

specific to the franchise operation
• Franchising Code of Conduct
• franchise specific obligations:
  • as per franchise agreement
  • as per updates and amendments to agreement over time.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • creating strategies and processes to manage relationships with franchisees • providing advice to franchisees • analysing franchisee needs • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to business documentation • access to feedback from franchisees • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of

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EVIDENCE GUIDE	
	franchising arrangements • evaluation of research undertaken to inform advice provided to franchisees • review of strategies and practices used to manage relationship with franchisees.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBFRA502B Manage a franchise operation.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Other communication channels may include:	• contact via email, mobile/office based telephone, pagers and other emergency contact channels • meeting schedules • workshops for franchisees
Services to be provided to franchisees may include:	• advice on operational matters • assistance with quality assurance • assistance with use and maintenance of equipment • facilitating the identification of training needs and training delivery
Required training may be:	• scheduled on cyclical basis (such as yearly refresher courses, product knowledge workshops) • specified in franchise agreement as franchise is established • required by legislation such as first aid, food handling

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Franchising

Co-requisite units

Co-requisite units		

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BSBFRA505B Manage closure of a franchise

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage the closure of a franchise or to transfer it to a new franchisee, or to take action to prevent a closure being executed. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to franchisors with a well established, sound theoretical knowledge base in franchising who are proficient in using a range of specialised technical and managerial techniques to undertake the closure of a franchise or transfer to a new franchisee.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Investigate and implement alternatives to closure	1.1. Discuss, document and analyse reasons for closure with ***relevant stakeholders*** 1.2. Use lessons learned from previous franchise closures and potential franchise closures to arrive at alternative strategies 1.3. Research and negotiate ***alternative strategies*** to closure with franchisee and relevant third parties 1.4. Assess feasibility of transferring franchise to new franchisee 1.5. Implement, where feasible, alternative arrangements to closure including transfer
2. Determine roles and responsibilities in closure or transfer of franchisee	2.1. Determine ***roles and responsibilities*** of all parties in closure or transfer in line with the Franchising Code of Conduct 2.2. Negotiate process for effecting closure or transfer with relevant stakeholders and document in the form of a plan 2.3. Allocate responsibilities for effecting closure or transfer 2.4. Negotiate closing date or transfer date for franchise with relevant stakeholders
3. Implement plan for closure or transfer	3.1. Communicate closing date or transfer date for franchise to relevant stakeholders

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ELEMENT	PERFORMANCE CRITERIA
	3.2. Carry out ***disposal of assets*** according to plan or transfer them to new franchisee 3.3. Facilitate financial settlements with financial institutions or franchisor's financial officers or debt collectors 3.4. Implement arrangements for closure or transfer in consultation with customers 3.5. Dispose of intellectual property including client database according to agreement between franchisor and franchisee 3.6. Undertake checks to ensure that the process for closure or transfer has been completed according to plan
4. Review implications for franchise operations	4.1. Analyse implications for franchise operations from review of closure or transfer 4.2. Identify and recommended improvements to franchise operations and management of franchises

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- business management skills to develop plans for closure
- communication and negotiation skills to work with franchisees to implement closure
- analysis and evaluation skills to determine alternatives to closure
- problem-solving skills to address issues arising in closure.

Required knowledge

- legislation, codes of practice and national standards relating to occupational health and safety (OHS), company law, fair trading, anti-discrimination and other areas specific to the franchise operation
- Franchising Code of Conduct
- franchise specific obligations:
  - as per franchise agreement

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REQUIRED SKILLS AND KNOWLEDGE
• as per updates and amendments to agreement.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • planning and evaluation of closure and alternatives • consulting all stakeholders involved in closure • documenting reasons for closure and incorporating these reasons into plans for future operations • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to business documentation • access to feedback from franchisees • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documented plans for closure • evaluation of alternative closure strategies developed • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of franchising arrangements.
Guidance information for	Holistic assessment with other units relevant to the

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EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant stakeholders may include:	• customers • financial institutions and backers for franchisee • franchisee • other franchisor management staff • regulatory authorities issuing relevant permits
Alternative strategies may include:	• franchise specific promotion • franchisor take-over of operations on a temporary basis until new franchisee is selected • negotiating 'grace periods' for debts • refinancing • resizing of business • transferring to new operator • combination of these strategies
Roles and responsibilities may include:	• disposing of assets • informing customers of new arrangements • managing financial settlements and handling debtors • managing supplier relationships during closure/transfer • selecting new franchisees
Disposal of assets may include:	• offer to new franchisee/s • sale • tender

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Franchising

Co-requisite units

Co-requisite units		

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BSBGOV401A Implement Board member responsibilities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake the diverse roles and responsibilities required of a Board member. Some aspects of governance activities may be subject to legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of the business or core functions of organisations who contribute their skills and knowledge to monitoring and guiding the activities of the organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify the business of the organisation	1.1. Ensure the history of the organisation is known and understood 1.2. List and explain the ***core functions*** of the organisation 1.3. Explain the relationship between the organisation, ***stakeholders and other organisations/entities***
2. Monitor operations	2.1. Identify and document outcomes for each ***operational area*** 2.2. Use ***information provided to review effectiveness*** and efficiency of operations 2.3. Suggest changes to operations if necessary
3. Follow the legal requirements when carrying out Board duties	3.1. List and describe relevant provisions of the ***legislation*** under which the organisation operates 3.2. Adhere to relevant aspects of ***Corporations Law*** 3.3. Adhere to the constitution of the organisation 3.4. List and comply with ***workplace responsibilities*** 3.5. Comply with the terms and conditions of funding agreements
4. Monitor trends and changes in the community	4.1. Attend community meetings, speaking on behalf of the Board as required and delegated 4.2. Maintain information and awareness of key stakeholders and political issues

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ELEMENT	PERFORMANCE CRITERIA
	4.3. Ensure the Board is informed of identified community and stakeholder needs 4.4. Review policies with respect to changing community needs, and incorporate into operations as required
5. Receive and act on community and stakeholder feedback	5.1. Receive and document feedback from the community and stakeholders about services 5.2. Evaluate feedback 5.3. Deal with feedback in accordance with policies and procedures, and in consultation with management 5.4. Document and support decisions with management

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and to people with diverse abilities
- communication and negotiation skills to work cooperatively with other Board members, management and staff of the organisation, key stakeholders and members of the community
- literacy skills to read and interpret rules, regulations, policies and other workplace documentation
- evaluation and decision making skills to review information presented to the Board and to enact decisions.

Required knowledge

- cultural context relevant to the community and location: as boards of governance oversee a wide variety of organisations, they must therefore ensure that they operate within the traditional and cultural values of the relevant context/s
- key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - consumer and corporations laws including appropriate state legislation
  - ethical principles
  - privacy laws
- organisational constitution, codes of conduct functions, policies and procedures.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • contributing to analysis and decision making of issues affecting Board and organisational performance • managing a number of different tasks • dealing with irregularities and breakdowns in routine • knowledge of organisational constitution, codes of conduct functions, policies and procedures.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated Board • access to office equipment and resources • examples of issues worked with by boards of governance, including community complaints, strategic decisions and internal staffing issues • examples of relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • assessment of explanation of core functions of the organisation • assessment of descriptions of relevant provisions of the legislation under which the organisation operates • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of the roles and responsibilities of Board members • observation of performance in role plays

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EVIDENCE GUIDE	
	• review of documented feedback from the community and stakeholders about services.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other governance units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Core functions may relate to:	• provision of specific goods • provision of specific services • specific cultural contexts: • Boards of Indigenous organisations that are upholders of traditional and cultural values
Stakeholders and other organisations/entities may include:	• commercial businesses owned by the corporation • community groups and organisations • competitors • consumers • joint owned entities held by other organisations • specific cultural groups: • related and non-related Aboriginal and Torres Strait Islander organisations • suppliers • trusts held by the organisation
Operational area may include:	• divisions, branches and positions within the organisation • lines of accountability
Information provided to review	• anecdotal information from the community

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RANGE STATEMENT	
effectiveness may include:	• financial reports • reports from staff, consultants, other bodies
Legislation may include:	• Aboriginal Councils and Associations Act 1976 • commonwealth, state/territory occupational health and safety (OHS) statutes • state/territory acts relating to core functions of the business or organisation • workplace agreements
Corporations Law may include:	• Corporations (Aboriginal and Torres Strait Islanders) Act, as applicable to a range of Indigenous organisations • liabilities of Board members • responsibilities of Board members
Workplace responsibilities may include:	• equal opportunity • OHS • staff contracts

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Governance

Co-requisite units

Co-requisite units		

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BSBGOV402A Work within organisational structure

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to be an active participant in the governance activities of a Board, with an understanding of the roles and relationships to other roles on the Board and within the organisation. Some aspects of governance activities may be subject to legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of the business or core functions of organisations who contribute their skills and knowledge to monitoring and guiding the activities of the organisation, specifically in relation to working effectively with the staff and management of the organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Differentiate roles and responsibilities	1.1. Differentiate and document ***governance*** and ***management issues*** of the organisation in the ***organisation's governance policy guidelines*** 1.2. Identify, document and refer to the relationships between governance issues and management issues 1.3. Identify and document the roles of Board members in the organisation's governance policies and procedures 1.4. Explain the relationship between the Board and ***associated entities***, and their management 1.5. Outline the Board's decision-making processes
2. Document management roles and responsibilities	2.1. Document performance outcomes, with ***appropriate assistance***, and include in ***position description*** and contract 2.2. Clarify and document management duties, in consultation with ***management*** 2.3. Ensure areas of responsibility are discussed with Board members who are also employed staff, and establish and document guidelines
3. Supervise management of the	3.1. Receive information and advice from the manager

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ELEMENT	PERFORMANCE CRITERIA
organisation	and apply in decision making 3.2. Instruct the manager to implement policy decisions and to follow specific directions as required 3.3. Receive feedback from the manager about previous directions 3.4. ***Regularly review*** management performance in accordance with contract and position description

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and to people with diverse abilities
- communication and negotiation skills to work cooperatively with other Board members, management and staff of the organisation, key stakeholders and members of the community
- analysis skills to review income and expenditure against budgets
- problem-solving skills to make recommendations on variances to budgets
- evaluation skills to evaluate income and expenditure performance targets within budgets
- data collection and analysis skills to gather and assess movements within budgeted figures.

Required knowledge

- cultural context relevant to the community and location: as boards of governance oversee a wide variety of organisations, they must therefore ensure that they operate within the traditional and cultural values of the relevant context/s
- key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - consumer and corporations laws including appropriate state/territory legislation
  - ethical principles
  - privacy laws
- organisational constitution, codes of conduct functions, policies and procedures.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • understanding of the relationship and differences between boards of governance and organisational management • providing supervision to organisational management • working with irregularities and breakdowns in communications and routine between Board members and/or organisational management.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated Board • access to office equipment and resources • examples of issues worked with by boards of governance, including community complaints, strategic decisions and internal staffing issues • examples of relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation identifying the relationships between governance issues and management issues • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of organisational constitution, codes of conduct functions, policies and procedures • observation of performance in role plays • assessment of written reports outlining the Board's decision-making processes.
Guidance information for	Holistic assessment with other units relevant to the

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EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended, for example: • other governance units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Governance issues may include:	• Board leadership • Board planning • policy formulation
Management issues may include:	• day-to-day administration and decision making • management responsiveness
Organisation's governance policy guidelines may include documentation of:	• Board calendar • Board evaluation • Board meeting agenda • Board meetings • Board minutes • Board papers • Board structure • chief executive officer evaluation • committees • contacts • delegation of authority • director development • director protection • director selection and induction • monitoring • role of Board • role of chairperson • role of chief executive officer • role of company secretary

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RANGE STATEMENT	
	• role of individual directors • service/advice • strategy formulation
Associated entities may include:	• commercial businesses owned by the corporation • joint owned entities held by other organisations • trusts held by the organisation
Appropriate assistance may include:	• consultants • key stakeholders • other independent parties • senior government or non-government personnel
Position description may be used for:	• performance review • recruitment
Management may include:	• management groups • managers • supervisors • team leaders
Regular review may include:	• assessment against performance outcomes • independent assessment • interview

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Governance

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Co-requisite units

Co-requisite units		

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BSBGOV403A Analyse financial reports and budgets

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to analyse financial reports and budgets as a member of a Board of governance of an organisation. Some aspects of governance activities may be subject to legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of the business or core functions of organisations who contribute their skills and knowledge to monitoring and guiding the activities of the organisation, specifically in relation to working to ensure organisational finances are appropriately allocated and accounted for.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Review financial reports and budgets	1.1. Obtain revenue/expenditure/requests/predictions from ***appropriate person*** 1.2. Consider and assess future organisational operations, with reference to all available ***plans*** 1.3. Consider previous financial statements to provide baseline information 1.4. Review budgets and cash flows using all available information
2. Monitor revenue and expenditure against budget	2.1. Discuss and agree upon appropriate monitoring and ***reporting systems***, and establish procedures 2.2. Compare income and expenditure to budget and previous periods, and identify and investigate discrepancies 2.3. Identify and examine achievement and variances to the budget, in liaison with appropriate person 2.4. Document recommendations for action on variances 2.5. Request regular reports of operations to indicate fluctuations 2.6. Provide ***financial statements*** and accompanying report of operations to appropriate person for discussion

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ELEMENT	PERFORMANCE CRITERIA
3. Finalise budget	3.1. Ensure ***expenditure*** commitments are brought into line with final income figures 3.2. Finalise, document and approve final budget in line with operational program 3.3. Present the final budget to appropriate person and ***stakeholders*** 3.4. Ensure reporting requirements of relevant corporate authority and funding bodies are met

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and to people with diverse abilities
- communication and negotiation skills to work cooperatively with other Board members, management and staff of the organisation, key stakeholders and members of the community
- literacy skills to read and interpret rules, regulations, policies and other workplace documentation
- numeracy skills to evaluate and make decisions based on financial data
- technology skills to understand management and accounting systems.

Required knowledge

- cultural context relevant to the community and location: as boards of governance oversee a wide variety of organisations, they must therefore ensure that they operate within the traditional and cultural values of the relevant context/s
- key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - consumer and corporations laws including appropriate state/territory legislation
  - ethical principles
  - privacy laws
  - Australian Accounting and Auditing Standards
  - banking institutions guidelines
  - Australian Taxation Office regulations

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REQUIRED SKILLS AND KNOWLEDGE
• organisational constitution, codes of conduct functions, policies and procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • monitoring income and expenditure against designated budgets • ensuring the budget considers existing and planned activities of the organisation • ensuring appropriate monitoring systems are in place to provide an accurate picture of each event/activity/program/service of the organisation's operations • documenting recommendations for action on any variances to the budget in order to keep it within acceptable budgeting limits • knowledge of key provisions of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • participation on an actual or simulated Board • access to office equipment and resources • examples of budgets, cash flows and other financial data and statements • examples of relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of comparison of income and expenditure to budget and previous periods, and identification and investigation of discrepancies

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EVIDENCE GUIDE	
	• analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of financial requirements of organisations • observation of performance in role plays • assessment of final budget documentation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other governance units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Appropriate person may include:	• auditor/s • chief executive officer • deputy executive officer • finance manager/officer • section manager/s
Plans may include:	• building/equipment/maintenance plan • business plan • cash flow • event/activity/program/section budget • financial management plan • human resources management plan • strategic plan
Reporting systems may include:	• balance sheet • cash flow • profit and loss statement • written report

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RANGE STATEMENT	
Financial statements may include:	• balance sheet • cash flow • general ledger report • profit and loss statement
Expenditure may include:	• administration • capital requirements • consultants • contracts for goods/services • repair and maintenance • salaries • vehicle costs
Stakeholders may include:	• community groups and organisations • consumers • members • shareholders • staff • trusts held by the organisation

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Governance

Co-requisite units

Co-requisite units		

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BSBHRM401A Review human resources functions

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake research that supports work across a range of human resources functional areas. This is a foundation unit for any person wishing to pursue competency in human resources and provides a sound basis for working across various human resources functional areas. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals requiring a broad knowledge of human resources functions. It is not assumed that individuals at this level would have responsibility for supervising the work of others. However it is assumed that as a human resources practitioner, their work will support effective work practices across the organisation. The unit requires a broad understanding of human resources functions, associated policy frameworks and the administrative requirements to support these functions and policies.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Research human resources functions	1.1. Clarify ***human resources issues*** for review and document scope of review 1.2. Identify local, state/territory, national and international human resources networks for human resources professionals 1.3. Identify information sources for human resources data and information 1.4. Select a ***research strategy*** suitable to the topic 1.5. Consult with ***relevant personnel*** 1.6. Undertake research 1.7. Review research findings
2. Review policy and procedures	2.1. Locate policies and procedures relevant to the research topic

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ELEMENT	PERFORMANCE CRITERIA
frameworks	2.2. Analyse strengths and weaknesses of policies and procedures 2.3. Consider legislation, regulations and standards that apply to the policies and procedures and the research topic
3. Apply ethical framework	3.1. Review ***ethical requirements*** associated with the human resources function under review 3.2. Consider ethical obligations of human resources personnel working in the area under review 3.3. Document behaviours associated with working ethically in the area under review
4. Report on research outcomes	4.1. Collate, analyse and document key findings of the review 4.2. Write report on outcomes of research 4.3. Develop recommendations for future activity

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- judgement and decision making skills to review ethical and policy frameworks and to recommend suggested improvements
- literacy skills to research an issue and to write a clear and legible report which documents key issues coherently.

Required knowledge

- human resources functions and policy frameworks
- legal and compliance requirements for working in human resources
- roles and responsibilities of human resources practitioners.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the

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EVIDENCE GUIDE	
performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • research report which reviews human resources functions and evidences understanding of the requirement for good policy and ethical approaches • knowledge of legal and compliance requirements for working in human resources.
Context of and specific resources for assessment	Assessment must ensure: • examples of human resources policies and files on performance feedback, disputes and grievances, workers compensation and leave applications.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written report on outcomes of research • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations on human resources function/s being reviewed • oral or written questioning to assess knowledge of human resources function/s being reviewed and policy frameworks • evaluation of research undertaken • review of documentation analysing the strengths and weaknesses of policies and procedures • review of documentation of behaviours associated with working ethically in the area under review.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Human Resources.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Human resources issues may include:	• change management • employee assistance programs • human resources information systems (HRIS) • industrial relations • learning and development • occupational health and safety (OHS) • performance management • rehabilitation and return to work schemes • remuneration • selection and recruitment • succession planning
Research strategies may involve:	• interviews • literature searches of print and online resources • statistical analysis • surveys • websites
Relevant personnel may include:	• experienced human resources practitioners • training and development staff • managers and team leaders • industry experts or spokespersons
Ethical requirements may include:	• addressing improper behaviour • application of company values • Code of Conduct • confidentiality • principles such as fairness, respect, impartiality and integrity • reporting processes

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Human Resource Management

Co-requisite units

Co-requisite units		

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BSBHRM402A Recruit, select and induct staff

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to execute tasks associated with the recruitment cycle. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a role in recruitment, selection and induction functions who work under the direction of a human resources manager. It is not assumed that the individuals addressed by this unit have staff who report to them, although this may be the case. Performance of the work described in this unit will be underpinned by in depth knowledge of the work of the organisation, and how recruitment and selection practices fit with other human resource functions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Determine job descriptions	1.1. Clarify time lines and requirement for appointment 1.2. Assist with preparation of ***job descriptions*** which accurately reflect the role requirements in accordance with organisational procedures and ***legislation***, ***codes and national standards*** and ***occupational health and safety*** (***OHS***) ***considerations*** 1.3. Consult with relevant personnel about job descriptions 1.4. Ensure that job descriptions do not contravene legislative requirements 1.5. Obtain approvals to advertise position
2. Plan for selection	2.1. ***Advertise*** vacancies for ***staffing requirements*** in accordance with organisational policies and procedures 2.2. Consult with relevant personnel to convene selection panel and to develop interview questions

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Short list applicants 2.4. Ensure that interview questions do not breach legislative requirements 2.5. Schedule interviews and advise relevant personnel of times, dates and venues
3. Assess and select applicants	3.1. Participate in interview process and assess candidates against agreed selection criteria 3.2. Discuss assessment with other selection panel members 3.3. Correct any biases or deviations from agreed procedures and negotiate for preferred candidate 3.4. Contact referees for referee reports 3.5. Prepare selection report and make recommendations to senior personnel for appointment 3.6. Advise unsuccessful candidates of outcomes and respond to any queries 3.7. Complete all necessary documentation in accordance with organisational procedures 3.8. Secure agreement of preferred candidate
4. Appoint and induct successful candidate	4.1. Provide successful candidate with employment contract and other documentation 4.2. Advise managers and staff of starting date and make necessary administrative arrangements for pay and employee record keeping 4.3. Advise manager and work team of new appointment 4.4. Arrange induction in accordance with organisational policy

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to use networks to source suitable applicants, to listen to and understand what is being said in interviews, and to advise on the outcomes of the selection process • literacy skills to work with job descriptions to devise suitable questions for

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REQUIRED SKILLS AND KNOWLEDGE
interviews, to prepare letters for unsuccessful applicants and to make job offers • organising and scheduling skills to arrange interviews and venues.
Required knowledge
• documentation required for recruitment and selection • human resource functions, human resource life cycle and the place of recruitment and selection in that life cycle • principles of equity, diversity and relevant legislation. • range of interviewing techniques and other selection processes and their application.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated ability to work with job descriptions to source and select suitable staff • interviewing and other selection techniques that demonstrate awareness off equal opportunity and anti-discrimination requirements • knowledge of the human resource life cycle.
Context of and specific resources for assessment	Assessment must ensure: • access to an appropriate range of documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on recruitment and selection • demonstration of selection techniques • direct questioning combined with review of portfolios of evidence and third party workplace

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EVIDENCE GUIDE	
	reports of on-the-job performance by the candidate • observation of interviewing techniques • review of advertisements for staffing vacancies • review of documentation provided to successful candidate • oral or written questioning to assess knowledge of selection processes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Human Resources.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Job descriptions may include:	• attributes • competencies required by staff • job or person specifications • job title and purpose of position • necessary skills and knowledge • qualifications • selection criteria • tasks or duties associated with the position
Legislation, ***codes and national standards*** may include:	• award and enterprise agreements, and relevant industrial instruments • relevant industry codes of practice • relevant legislation from all levels of government that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination

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RANGE STATEMENT	
Occupational health and safety (***OHS***) ***considerations*** may include:	• establishment and maintenance of OHS training, records, induction processes • performance against OHS legislation and organisation's OHS system, especially policies, procedures and work instructions
Advertising may include:	• electronic or print • internal or external • outsourcing
Staffing requirements may include:	• permanent, temporary, full-time, part-time or casual

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Human Resource Management

Co-requisite units

Co-requisite units		

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BSBHRM403A Support performance management process

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assist in the effective implementation of a performance management system and to facilitate employee performance. Please note that this unit does not address the line management responsibilities of performance management; this is addressed in BSBMGT502B Manage people performance. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to human resources officers, or people in similar roles, who work under the direction of a human resource manager. The unit covers the requirement to support the performance management system across the organisation by assisting with the administrative infrastructure, provision of information and advice, and facilitating review mechanisms.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Review performance management infrastructure	1.1. Ensure that all positions have current ***position descriptions*** specifying key requirements of the role 1.2. Ensure that managers have provided reportees with performance indicators that are consistent with the position description requirements 1.3. Check that ***performance appraisal meetings*** are held in accordance with organisational timeframes, that correct documentation has been completed and that all necessary parties have recorded agreement 1.4. Check that appropriate organisational procedures have been followed for ***rewarding*** good performance 1.5. Check that appropriate organisational procedures have been followed for addressing under performance

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ELEMENT	PERFORMANCE CRITERIA
	1.6. Provide advice and support where there is dissention about performance appraisal outcomes
2. Promote performance management system	2.1. Clarify goals and methods of the performance management system 2.2. Address any questions from employees about the performance management system 2.3. Arrange or deliver, training or instruction in how to use the performance management system 2.4. Encourage ongoing and regular feedback on performance as well as formal performance appraisals
3. Collate performance management data	3.1. Review performance management documentation to establish trends or problem areas which require attention 3.2. Review patterns in skill or performance gaps and consider requirements and options for ***performance development*** 3.3. Revise policies or procedures if necessary 3.4. Suggest improvements to the performance management system

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to advise on methods for giving feedback and to assist managers with means for addressing poor performance • organisational skills to see that systems are followed and that all necessary documentation is kept and accessible • technology skills to write reports and to access records of interviews.
Required knowledge
• performance management and its contribution to the human resource cycle and organisational objectives • rewards and incentive schemes • warning systems, grievance procedures.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • analysis of a performance management system and its strengths and weaknesses • development of methods and techniques to support the effective implementation of the performance management system • knowledge of performance management.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on performance management • demonstration of techniques in providing advice on performance feedback • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations on performance management systems • review of documentation outlining advice and support provided where there is dissention about performance appraisal outcomes • evaluation of documentation outlining training or instruction provided in using the performance management system • oral or written questioning to assess knowledge of rewards and incentive schemes.
Guidance information for	Holistic assessment with other units relevant to the

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EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Human Resources.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Position descriptions may also be termed, or include:	• duty statements • job specifications • role statements
Performance appraisal meetings may consider:	• any qualitative or quantitative measurement of performance • data from tailored software • feedback from peers, reportees, customers or clients • key performance indicators • perspectives of the manager and the person being reviewed
Rewards may include:	• additional superannuation • bonuses • incentives • innovative motor vehicle and other salary packaging opportunities • non-monetary rewards such as conference, training, purchase of special equipment • salary increases
Performance development may include:	• action learning sets • job rotation • mentoring or coaching • pairing with more experienced staff • shadowing

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RANGE STATEMENT	
	• training

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Human Resource Management

Co-requisite units

Co-requisite units		

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BSBHRM501A Manage human resources services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan and oversee and deliver human resources services. It is not specific to any given human resources function and deals with the coordination of services and approaches. This unit takes an overview of human resources services and includes business ethics. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to human resources managers with broad experience who have responsibility for coordinating a range of human resources practices across an organisation. They may have other human resources staff reporting to them.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Determine strategies for delivery of human resources services	1.1. Analyse strategic and operational plans to determine ***human resources requirements*** 1.2. Consult line and senior managers to identify human resources needs within their area 1.3. Develop ***options*** for delivery of human resources services 1.4. Ensure options for human resources services comply with ***legislative requirements and organisational policies*** 1.5. Develop and agree on strategies and action plans for delivery of human resources services 1.6. Agree and document roles and responsibilities of human resources team, line managers, and external contractors
2. Manage the delivery of human resources services	2.1. Develop and negotiate service agreements between the human resources team, service providers and client groups 2.2. Document and communicate service specifications, performance standards and timeframes 2.3. Identify and arrange training support if required 2.4. Agree and arrange monitoring of quality assurance processes 2.5. Ensure that services are delivered by appropriate

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ELEMENT	PERFORMANCE CRITERIA
	providers in accordance with service agreements and operational plans 2.6. Identify and rectify underperformance of human resources team or service providers
3. Evaluate human resources service delivery	3.1. Survey clients to determine level of satisfaction 3.2. Capture on-going client feedback for the review processes 3.3. Analyse feedback and surveys and recommend changes to service delivery 3.4. Obtain approvals to variations in service delivery from appropriate managers
4. Manage integration of business ethics in human resources practices	4.1. Ensure that personal behaviour is consistently ethical and reflects values of the organisation 4.2. Ensure that Code of Conduct is observed across the organisation and that its expectations are incorporated in human resources policies and practices 4.3. Observe confidentiality requirements in dealing with all human resources information 4.4. Deal with unethical behaviour promptly 4.5. Ensure that all human resources staff are clear about ethical expectations of their behaviour

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical and problem-solving skills to review business and operational plans and to develop and evaluate human resources strategies to support these plans • communication and negotiation skills to consult with key stakeholders across the organisation and to ensure their support for human resources strategies • communication skills to manage service delivery • learning skills to see that performance is managed and skills are developed in a range of contexts.
Required knowledge
• human resources strategy and planning processes as they relate to business and

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REQUIRED SKILLS AND KNOWLEDGE
operational plans • performance and contract management • relevant legislation which applies to human resources.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated skills in planning and implementing a coordinated approach to human resources functions across the organisation • demonstration of engaging key stakeholders, implementing methods for developing and monitoring human resources plans, and aligning human resources with broader business objectives • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports/examples of human resources plans and evaluations of those plans • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge of performance and contract management • review of documentation outlining roles and responsibilities of human resources team, line managers, and external contractors

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EVIDENCE GUIDE	
	• review of documentation outlining service specifications, performance standards and timeframes and documentation of how these were communicated.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Human Resource Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Human resources requirements may include:	• assessment and development centres • career management • competency development processes • counselling • discrimination, vilification and harassment advice • education and training programs • feedback • flexible work arrangements • induction and orientation programs • industrial relations advice • occupational health and safety (OHS) • personal and career development planning • rehabilitation and return to work • remuneration/benefits advice • self-analysis and self-assessment • staff selection • succession planning • tele-working procedures

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RANGE STATEMENT	
	• workers compensation
Options will include:	• cost benefit analysis • risk analyses • recommendations to relevant groups and individuals - all those who have a role in the implementation of policies, procedures or decisions and/or are affected by their implementation
Legislative requirements and organisational policies may include:	• award and enterprise agreements, and relevant industrial instruments • relevant industry codes of practice • relevant legislation from all levels of government that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Human Resource Management

Co-requisite units

Co-requisite units		

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BSBHRM502A Manage human resources management information systems

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage human resources information systems from the research and planning stages, through selection of appropriate systems, to implementation, ongoing review and system upgrades. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a well established, sound theoretical knowledge base in human resources management and human resources information systems (HRIS) who are proficient in using a range of specialised technical and managerial techniques to plan, carry out and evaluate their own work and/or the work of a team. They may or may not have staff who report to them but they are authorised to oversee the HRIS.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify human resources information requirements	1.1. Collect, collate and document ***information requirements*** of users 1.2. Identify communication processes to support user needs 1.3. Agree on information requirements and communication processes with users and relevant managers 1.4. Develop a ***draft information systems management plan*** with agreed review mechanisms, timeframe and criteria 1.5. Specify information requirements in a clear and concise manner 1.6. Ensure information requirements are consistent with organisational objectives and policies 1.7. Identify resources required to meet the information

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ELEMENT	PERFORMANCE CRITERIA
	requirements within budget parameters
2. Select human resources information management system	2.1. Agree on selection criteria for the information management system with ***relevant groups and individuals*** 2.2. Ensure that selection criteria for the system has the capability to meet organisation's objectives, policies and budget parameters 2.3. Evaluate potential systems against the criteria 2.4. Undertake ***cost benefit*** and ***risk analysis*** in relation to the systems which meet the selection criteria 2.5. Establish preferences for system and provide selection report to senior managers 2.6. Ensure that preferred system is capable of being customised to meet organisation and user requirements
3. Implement human resources information system	3.1. Develop implementation plan with users, other relevant groups and individuals 3.2. Confirm implementation plan's roles and responsibilities with individuals and groups involved 3.3. Assign resources to meet implementation plan timeframe, quality and other objectives 3.4. Modify implementation schedule to resolve any problems arising 3.5. Ensure groups and individuals contribute to implementation in accordance with plan objectives
4. Monitor and evaluate performance of human resources information system	4.1. Monitor information system performance and prepare performance reports 4.2. Obtain feedback from users about the system 4.3. Benchmark system performance against other systems, and latest trends and developments 4.4. Analyse performance gaps and current strategies and introduce improvements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills
• literacy skills to write specifications for systems • people management skills to work with contractors or staff who will be implementing the HRIS • planing and organising skills to transition the HRIS • technology skills to ensure suitability of software for organisational requirements.
Required knowledge
• monitoring, measuring and evaluation techniques for a range of human resource management functions • procurement procedures, including preparation of a technical brief • types of HRIS that are available and their respective capabilities and limitations.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • assessment of written reports on HRIS specification, selection and implementation • implementation plan for an HRIS and associated management skills to oversee transition and implementation of a new HRIS • knowledge of the types of HRIS available and their respective capabilities and limitations.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on HRIS implementation

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EVIDENCE GUIDE	
	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentations about user information requirements • oral or written questioning to assess knowledge of HRIS capabilities • evaluation of implementation plan • review of documentation outlining feedback from users about the system.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Human Resource Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information requirements include:	• career development • employee relations and industrial relations • employee support • human resources development • legislative requirements • organisational development • performance management • recruitment, selection and induction • re-deployment of employees • termination of employees • workforce planning
Draft information systems management plan includes:	• proposed system objectives, methods of management, timeframes and other criteria

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RANGE STATEMENT	
	• specification of system requirements for the purposes of selecting appropriate systems to manage the information
Relevant groups and individuals means:	• all those who have a role in the implementation of policies, procedures or decisions and/or are affected by their implementation
Cost benefit analysis means:	• calculation to determine whether the results/outcomes of a particular course of action are sufficient to justify the costs and risks in taking that action
Risk analysis means:	• determination of the likelihood of a negative event preventing the organisation meeting its objectives and the likely consequences of such an event on organisational performance

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Human Resource Management

Co-requisite units

Co-requisite units		

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BSBHRM503B Manage performance management systems

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to design, implement and oversee performance management systems. It includes developing and managing ongoing performance feedback strategies and conducting formal performance feedback meetings. The unit also includes specific intervention associated with under-performance or misconduct. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a well-established theoretical knowledge of human resources management and performance management who are proficient in using a range of specialised technical and managerial techniques to plan, carry out and evaluate their own work and the work of a team. They may or may not have staff who report to them, but they are authorised to establish an effective performance management system for an organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop performance management systems	1.1. Analyse strategic and operational plans to identify relevant policies and objectives for performance management system 1.2. Design methods and processes for line managers to develop key performance indicators for those reporting to them 1.3. Develop organisational timeframes and processes for formal performance management sessions 1.4. Ensure performance management systems developed are flexible enough to cover the range of ***employment situations*** in the organisation 1.5. Consult with key stakeholders about the system and agree on its features 1.6. Gain support for the implementation of the performance management system

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ELEMENT	PERFORMANCE CRITERIA
2. Implement performance management systems	2.1. Train relevant groups and individuals to monitor performance, identify ***performance gaps*** and manage talent 2.2. Ensure that line managers are monitoring performance regularly and that ***intervention*** occurs to address poor performance and acknowledge excellent performance 2.3. Work with line managers, where necessary, to assist them to address poor performance according to organisational policies and legal requirements 2.4. Support line managers to counsel and discipline employees who continue to perform below standard 2.5. Provide support to terminate employees who fail to respond to interventions, according to organisational protocols and legislative requirements 2.6. Recognise excellence according to organisational policy 2.7. Ensure recorded outcomes of performance management sessions are accessible and stored according to organisational policy
3. Coordinate formal feedback processes	3.1. Develop performance feedback plans by relevant managers or team leaders and lodge them with human resources staff 3.2. Provide training and assistance to managers or team leaders participating in the feedback process 3.3. Agree on and sign plans for performance improvement and ***individual learning and development*** 3.4. Establish processes to deal with problems or grievances that arise from the performance feedback 3.5. Make specialist advice on career development available to participants in the process
4. Coordinate individual or group learning development plans	4.1. Contract ***appropriate providers*** for performance development, as identified by the plans, according to organisational policy 4.2. Design learning and development plans to contribute to the development of a learning organisation 4.3. Deliver learning and development plans according to agreed timeframes and ensure they deliver specified outcomes 4.4. Monitor learning and development activities to

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ELEMENT	PERFORMANCE CRITERIA
	ensure compliance with quality assurance standards 4.5. Negotiate remedial action with providers where necessary 4.6. Generate reports to advise appropriate managers on progress and success rates of activities 4.7. Regularly evaluate and improve all aspects of the performance management system, in keeping with organisational objectives and policies

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to ensure system is practical and gathers necessary information
- communication and conflict-management skills to deal with grievances, disputes and disagreements that may arise
- leadership skills to obtain support and endorsement of the performance management system across the organisation
- training, coaching, mentoring and facilitation skills using a range of methods to cater for differences in learning styles, to ensure managers are competent to deliver the systems

Required knowledge

- characteristics of a learning organisation
- equal employment opportunity, diversity and anti-discrimination policies and legislation
- grievance procedures
- models for giving feedback and options for skill development
- options in the design of performance management and talent management systems
- role of performance management in relation to broader human resources and business objectives

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• development and implementation of:
	  • a performance management system that aligns with a human resource strategy
	  • a formal feedback process
	  • individual or group learning development plans.

Context of and specific resources for assessment	Assessment must ensure access to appropriate documentation and resources normally used in the workplace.
Method of assessment	The following assessment methods are appropriate for this unit: • assessment of reports on performance management and performance development systems • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in performance management • observation of presentations • review of plans for performance improvement and individual learning and development • review of reports generated to advise appropriate managers on progress and success rates of activities • oral or written questioning to assess knowledge of models for giving feedback and options for skill development and talent management.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBHRM507A Manage separation or termination.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Employment situations may include:	• casual and contract work • full-time and part-time work • marketing and sales • office and clerical • physical labour • processing • production • technical or scientific • tele-working • warehousing and transport.
Performance gaps may include:	• costs above budget • disruptive conflict • external interference • failure to meet strategic or operational objectives • low or high turnover of labour • productivity below budget • quality, OHS or environmental failure • work bans or go slow.
Intervention may include:	• coaching • counselling • disciplining • giving praise • recognising good performance.
Individual learning and development may include:	• enhancement of knowledge • mentoring • personal development • project work • skills training • visits to other workplaces.
Appropriate providers include:	• consultants • external and internal providers • trainers.

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce development - human resource management

Co-requisite units

Co-requisite units		

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BSBHRM504A Manage workforce planning

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan workforce strategies to achieve organisational goals and objectives. It includes aligning workforce objectives with business plans, analysing labour market trends and predictions, and designing strategies and succession plans to ensure a competent and appropriately diverse workforce is available to meet anticipated changes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to human resources managers or staff who take a role in a policy or planning unit with a focus on workforce planning. Typically this work would occur in larger organisations where supply of skilled labour needs special attention. The unit covers the research associated with labour markets and the requirement to match organisational needs with employee skill and commitment.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Assess supply and demand	1.1. Review ***business plans*** to determine predicted areas of organisational growth and downsizing and associated labour requirements 1.2. Analyse existing workforce to determine areas where there are excesses or shortages 1.3. Review organisational requirements for ***diversity*** in the workforce 1.4. Analyse current workforce's capacity to meet current and predicted demands for business goods and services 1.5. Consider existing organisational structure and its strengths and shortcomings in relation to foreseeable changes 1.6. Research and review current and predicted external

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ELEMENT	PERFORMANCE CRITERIA
	labour supply ***data***, and demographic and economic data, to forecast human resources supply 1.7. Review staffing budgets to predict cost of workforce changes
2. Develop workforce objectives and strategies	2.1. Establish ***objectives*** for the modification to or retention of the workforce 2.2. Define objectives to address areas with unacceptably high staff turnover 2.3. Define objectives to retain required skilled labour 2.4. Define strategies to source skilled labour 2.5. Communicate objectives and rationale to relevant stakeholders 2.6. Obtain agreement and endorsement for objectives and establish targets 2.7. Develop contingency plans to cope with extreme situations
3. Implement initiatives to support workforce planning objectives	3.1. Implement action to support agreed objectives for recruitment, training, redeployment and redundancy 3.2. Develop and implement strategies to assist workforce to deal with organisational change 3.3. Implement ***succession planning*** system to ensure desirable workers are developed and retained 3.4. Implement programs to ensure workplace is an employer of choice
4. Monitor and evaluate workforce trends	4.1. Review workforce plan against patterns in exiting employee and workforce changes 4.2. Monitor labour supply trends for areas of over- or under-supply in the external environment 4.3. Monitor effects of labour trends on demand for labour 4.4. Survey ***organisational climate*** to gauge worker satisfaction 4.5. Refine objectives and strategies in response to internal and external changes and make recommendations in response to global trends or incidents 4.6. Regularly review government policy on labour demand and supply 4.7. Evaluate effectiveness of change processes against agreed objectives

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication and leadership skills to explain the need for change and to gain support for change • literacy skills to read and write reports and succinct workforce plans • mathematical skills to work with data and predictions about labour supply information • analytical skills to review data according to the needs of the organisation.
Required knowledge
• current information about labour supply that is relevant to the specific industry or skill requirements for the organisation • industrial relations relevant to the specific industry • labour force analysis and forecasting techniques.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of a workforce plan which includes relevant research and specific strategies to ensure access to a skilled workforce • knowledge of labour demand and supply relevant to the specific industry or skill requirements for the organisation.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on labour supply trends and strategies to access and retain labour with required skills • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation outlining agreed objectivesfor the modification to or retention of the workforce and how these objectives were communicated to senior management • review of strategies implemented to assist the workforce to deal with organisational change • evaluation of implementation of succession planning system • review of the results of the organisational climate survey • oral or written questioning to assess knowledge of industrial relations relevant to the specific industry.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Human Resource Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Business plans may also include:	• strategic or operational plans
Diversity may include all kinds of	• age

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RANGE STATEMENT	
differences the workforce, including:	• cultural or linguistic background • gender • race • religious beliefs • sexuality
Data may include:	• ABS statistics • data on numbers of graduates or places in universities or the vocational education and training system • information from industry journals or professional associations • research reports
Objectives may include:	• becoming an employer of choice • specific objectives for the organisation on recruitment, training, redeployment and redundancy • triple bottom line
Succession planning refers to:	• processes that ensure that preferred staff will stay with the organisation
Organisational climate surveys may include:	• employee opinion surveys • employee satisfaction surveys • systems for checking how staff perceive the organisation and its functioning

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Human Resource Management

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Co-requisite units

Co-requisite units		

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BSBHRM505B Manage remuneration and employee benefits

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to implement an organisation's remuneration and benefit plans. It incorporates all functions associated with remuneration, including packaging, salary benchmarking, market rate reviews, bonuses and the legislative aspects of remuneration and employee benefits. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to human resources managers responsible for overseeing an organisation's remuneration process.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop organisation's remuneration strategy	1.1. Analyse strategic and operational plans to determine the scope of ***remuneration and benefits*** plans 1.2. Undertake research on current practice, recent developments and legislative parameters for the remuneration strategy 1.3. Develop options for consideration by relevant managers 1.4. Present options showing the link to organisational strategic objectives 1.5. Ensure remuneration policies and incentive plans are agreed and recorded 1.6. Ensure that organisation is positioned as an ***employer of choice*** and regarded as a desirable workplace
2. Implement remuneration strategy	2.1. Research occupational groups to determine those which are industrial agreement based 2.2. Access or undertake ***market rates surveys*** regularly to ensure the organisation's required level of competitiveness for particular occupational groups is maintained 2.3. Align remuneration and benefits plans with performance management system 2.4. Ensure that employees receive at least their minimum entitlements according to organisational

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ELEMENT	PERFORMANCE CRITERIA
	policies and legal requirements 2.5. Ensure ***salary packages*** comply with organisational policies and legal requirements, including fringe benefits tax (FBT) and superannuation 2.6. Ensure ***incentive arrangements***, if included, comply with the organisation's remuneration strategy
3. Review and update remuneration strategy	3.1. Consult managers and employees about the effectiveness of the remuneration strategy 3.2. Amend strategy and plans as necessary to meet organisational policies and legal requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- interpersonal skills to:
  - communicate sensitively about remuneration
  - observe confidentiality
- numeracy and technology skills to:
  - calculate costs to the organisation
  - graph salary costs
  - link salaries to budgets
- research skills to determine appropriate models of remuneration and benefits for particular occupational groups and individuals

Required knowledge

- award structures for industrial agreements
- ethical practices relating to remuneration and benefits strategies
- leasing arrangements, including novated leases
- models for bonus and incentive schemes, including gain sharing or profit sharing
- relevant legislation, for example equal employment opportunity, diversity and anti-discrimination legislation
- remuneration principles or models and strategies
- requirements of the Australian Taxation Office in relation to income tax, superannuation reporting, FBT and bonus payments.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • compliance with the legal aspects of managing remuneration and benefits • application of remuneration strategies for different occupational groups and circumstances • application of awards and agreements to structure remuneration processes • application of the requirements of the Australian Taxation Office in relation to income tax, superannuation reporting, FBT and bonus payments.
Context of and specific resources for assessment	Assessment must ensure access to appropriate documentation and resources normally used in the workplace.
Method of assessment	The following assessment methods are appropriate for this unit: • assessment of reports on remuneration models and approaches • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of research undertaken on current practice, recent developments and legislative parameters for the remuneration strategy • review of remuneration options developed for consideration by relevant managers • oral or written questioning to assess knowledge of legislation and the taxation system.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Remuneration and benefits may include:	• allowances • annual leave • bonuses or incentives • competency-based progression • employee share plans • ex gratia payments • expense reimbursement • family and carer's leave • flexible work arrangements • fringe benefits • leave without pay • long service leave • motor vehicle • salaries and wages • share options • sick leave • special leave • study leave • superannuation.
Employer of choice may include:	• ability to attract and retain high performing staff • flexible and inclusive work environment supported by the chief executive officer and managers • policies and practices that discourage harassment or discrimination • reputation for good workplace relationships, a culture of trust and good pay and conditions • reputation for being fair, flexible, innovative and engendering employee engagement • training and development programs that encourage people to plan and follow a career pathway.
Market rate surveys may include:	• data from remuneration specialists • general community surveys • industry salary benchmarking • surveys conducted by the organisation.

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RANGE STATEMENT	

Salary packages:	• may include payment arrangement where the total remuneration and benefits payable to an employee are calculated as total cost of employment, including:
	  • salary
	  • allowances
	  • motor vehicle
	  • superannuation
	  • fringe benefits
	• do not include payroll tax or workers compensation insurance.

Incentive arrangements may include:	• commission • bonuses • share plans • share options • gain sharing • profit sharing.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce development - human resource management

Co-requisite units

Co-requisite units		

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BSBHRM506A Manage recruitment selection and induction processes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage all aspects of the recruitment selection and induction processes in accordance with organisational policies and procedures. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to human resources managers or human resources personnel who take responsibility for managing all aspects of selecting new staff and orientating those staff to their new positions. It is not assumed that the manager will be directly involved in the selection processes themselves, although this may well be the case. In small organisations this role may belong to someone who is not a dedicated human resources professional; the unit however will still be applicable.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop recruitment, selection and induction policies and procedures	1.1. Analyse strategic and operational plans and policies to identify relevant policies and objectives 1.2. Develop ***recruitment***, ***selection and induction policies and procedures*** and supporting documents 1.3. Review options for technology to improve the efficiency and effectiveness of the recruitment and selection process 1.4. Obtain support for policies and procedures from senior managers 1.5. Trial forms and documents that support policies and procedures and make necessary adjustments 1.6. Communicate policies and procedures to relevant staff and provide training if required
2. Recruit and select staff	2.1. Determine future human resources needs in collaboration with ***relevant managers and sections*** 2.2. Ensure current position descriptors and person specifications for vacancies are used by managers

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ELEMENT	PERFORMANCE CRITERIA
	and others involved in the recruitment, selection and induction processes 2.3. Provide access to training and other forms of support to all persons involved in the recruitment and selection process 2.4. Ensure that ***advertising*** of vacant positions complies with organisational policy and legal requirements 2.5. Utilise ***specialists*** where necessary 2.6. Ensure that ***selection procedures*** are in accordance with organisational policy and legal requirements 2.7. Ensure that processes for advising applicants of selection outcome are followed 2.8. Ensure that job offers and contracts of employment are executed promptly and that new appointments are provided with advice about salary, terms and conditions
3. Manage staff induction	3.1. Provide access to training and ongoing support for all persons engaged in staff induction 3.2. Check that induction processes are followed across the organisation 3.3. Oversee the management of probationary employees and provide them with feedback until their employment is confirmed or terminated 3.4. Obtain feedback from participants and relevant managers on the extent to which the induction process is meeting its objectives 3.5. Make refinements to induction policies and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to liaise across the organisation and to ensure that policies and procedures are well supported • leadership skills to engage others and to ensure that good processes are followed and supported

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REQUIRED SKILLS AND KNOWLEDGE
• literacy skills to document clear policies and procedures and to develop proformas to support recruitment, selection and induction.
Required knowledge
• concept of outsourcing • diversity, equal employment opportunity and anti-discrimination principles and associated legislation • employee contracts • industrial relations • recruitment and selection methods, including assessment centres • relevant legislation on equal opportunity, industrial relations and anti-discrimination • relevant terms and conditions of employment • understanding of psychometric and skills testing programs • workplace relations regulations, workplace relations legislation and other relevant legislation.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of a policy and procedures framework for recruitment, selection and induction OR critical analysis of an existing policy and procedures framework for recruitment, selection and induction • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on recruitment,

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EVIDENCE GUIDE	
	selection and induction processes • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of training and other forms of support provided to all persons involved in the recruitment and selection process • evaluation of trialling of forms and documents that support policies and procedures • review of documentation outlining feedback obtained from participants and relevant managers on the extent to which the induction process is meeting its objectives • oral or written questioning to assess knowledge of relevant legislation and selection processes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units form the Diploma of Human Resource Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Recruitment, selection and induction policies and procedures may address:	• application processing • competency profiling • documentation and use of standard forms • equal opportunity, anti-discrimination and diversity principles • interviewing methodologies • job analysis • job classifications, assessment centres • job description

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RANGE STATEMENT	
	• job evaluation • privacy and confidentiality • probationary periods • psychometric assessment • recruitment advertising • reference checks • selection panels and their composition • the application of commercial software packages to improve efficiency in recruitment and selection processes • training for new staff • use of external agencies
Relevant managers and sections includes:	• those who have a role in the recruitment selection or induction processes
Advertising may occur through:	• internal channels • internet • newspapers • radio • recruitment agencies or specialists • television
Specialists may include:	• recruitment agencies • remuneration specialists • staff who run security checks • vocational psychologists
Selection procedures may include:	• aptitude test or IQ tests • behaviour in leaderless groups • demonstration of techniques or technical skills • interviews, including structured interviews, behavioural interviews or other interviewing methodologies • peer assessments • personality testing • psychometric testing • referee reports • use of an assessment centre • work samples

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Human Resource Management

Co-requisite units

Co-requisite units		

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BSBHRM507A Manage separation or termination

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to deal with redeployment, resignation, retirement, dismissal and redundancy, including the conduct of exit interviews. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to human resources managers or human resources personnel who take responsibility for overseeing all aspects of managing the termination of employment, voluntary and involuntary. The unit addresses separation at an individual level, through resignations and dismissal, and at the level of the group, through redundancy and restructuring. It is not assumed that the manager will be directly involved in terminating employees, although this may well be the case. In small organisations this role may belong to someone who is not a dedicated human resources professional; the unit however will still be applicable.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop policies and procedures for separation/termination of employment	1.1. Undertake ***research*** to determine features of best practice systems of ***separation***/***termination*** and the legal requirements 1.2. Undertake consultation with relevant managers prior to the introduction of new forms, procedures or systems 1.3. Develop ***policies***, ***procedures*** and supporting documentation for all forms of separation/termination 1.4. Ensure ***procedures for dismissal*** or termination respect employees, provide strict confidentiality and comply with legislation 1.5. Obtain support for separation/termination policies and procedures from senior managers

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ELEMENT	PERFORMANCE CRITERIA
	1.6. Communicate policies and procedures and supporting documents to relevant personnel 1.7. Use feedback to make refinements to policies, procedures and supporting documents for separation and termination
2. Manage separation/termination processes	2.1. Develop a ***redundancy*** or ***redeployment*** plan 2.2. Manage redundancies and redeployment and provide relevant information about processes so that work outcomes are not compromised 2.3. Provide outplacement or other assistance in accordance with organisational policies and legal requirements 2.4. Ensure that ***dismissals*** for incapacity to perform or misconduct comply with legislative and organisational requirements 2.5. Ensure that human resources staff, managers and supervisors have necessary skills and knowledge to take disciplinary action 2.6. Review workforce data for predicted numbers of people retiring and make necessary plans 2.7. Review and evaluate separation/termination procedures regularly and introduce improvements
3. Manage exit interview process	3.1. Ensure that separating employees are offered the opportunity to participate in exit interviews 3.2. Ensure that the process for exit interviews is clear and that staff are skilled to conduct them 3.3. Ensure that data from exit interviews is recorded and depersonalised 3.4. Analyse data from exit interviews to establish trends and patterns and introduce improvements across the organisation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical and organisational skills to work with data about trends and to plan for

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REQUIRED SKILLS AND KNOWLEDGE
redeployment or redundancies • communication skills to support disciplinary processes and to see that employees are properly counselled; to conduct exist interviews; and to negotiate terms and conditions of separation/termination.
Required knowledge
• disciplinary procedures • employment contracts, and terms and conditions • procedures for dismissal, suspension, voluntary termination, retirement and redundancy • relevant Commonwealth and state legislation on industrial relations, unlawful dismissal and grounds for dismissal • sexual harassment, discrimination, racial vilification policies and legislation.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of policies and procedures to manage all aspects of separation and termination of employees OR critical analysis of an existing policy and procedures framework on separation and termination • knowledge of the legislative requirements for dismissal • skills in counselling employees in disciplinary proceedings, providing advice on termination and conducting exit interviews.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples

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EVIDENCE GUIDE	
	are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on separation and termination • demonstration of counselling techniques for disciplinary procedures • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of analysis of exit interview data. • observation of demonstrated techniques in conducting exit interviews • oral or written questioning to assess knowledge of relevant legislation • review of policies, procedures and supporting documentation developedfor all forms of separation/termination • review of redundancy or redeploymentplan.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Human Resource Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Research may include:	• database search • library search • use of consultants/specialists • visits to best practice organisations
Separation*/*termination may	• cessation of a casual labour agreement

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RANGE STATEMENT	
include:	• conclusion of the employment contract by either party or both parties mutually • death • dismissal • expiry of a fixed term contract • redeployment • redundancy • resignation • retirement
Policies and procedures may address:	• discrimination • dismissal, including unlawful dismissal • entitlements • exit interviews • legislative requirements • redundancy and redeployment • resignation • rights of appeal • warning systems and grievances
Procedures for dismissal may include:	• counselling • due process (at least one opportunity for the employee to give an explanation of their continued incapacity or misconduct) • negotiation with employee and/or their representative • warnings (written and verbal)
Redundancy means:	• when an organisation decides it has a job which it does not require to be done any more by either the present incumbent or someone else
Redeployment means:	• cessation of one contract of employment and its replacement with a new contract for a different position
Dismissal means:	• termination of the employee by the employer for misconduct or incapacity to perform the job
Exit interview means:	• formal standard interview conducted in accordance with organisational policy, to obtain information from an employee who is leaving their employment, about their employment experiences

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Human Resource Management

Co-requisite units

Co-requisite units		

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BSBHRM509A Manage rehabilitation or return to work programs

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to process and analyse both workers compensation and sick leave claims. It also covers the establishment of rehabilitation needs and return to work programs, and their monitoring, ongoing review and evaluation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to human resources managers or specialists who manage claims and ensure that the organisation provides appropriate support for the worker. Note that the unit does not in any way address the process of curing the worker of their injury or illness as this is the task of the health professional. Instead the unit focuses on the process of dealing with claims and ensuring that the organisation supports the worker through return to work programs. In large organisations this work may be a full time role for some people, in smaller organisations it would typically be a part of a broader role with a human resources focus.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Analyse claims	1.1. Ensure that the organisation has and maintains a current Workers' Compensation insurance policy (or equivalent) as required by the applicable legislation 1.2. Process ***claims*** in accordance with organisational policies, and legal and insurance requirements 1.3. Dispute claims where insurer or organisational requirements are not met 1.4. Notify ***rehabilitation provider*** in accordance with organisational procedures 1.5. Advise claimants as to whether their claim has been accepted 1.6. Analyse claims to identify the nature of the illness/injury and prepare report/s 1.7. Identify projected period of absence and where

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ELEMENT	PERFORMANCE CRITERIA
	rehabilitation assistance is required, and ensure arrangements are made in the work team to deal with absence
2. Establish rehabilitation/return to work program	2.1. Ensure consultation occurs between rehabilitation provider and treating doctor 2.2. Ensure consultation occurs between rehabilitation provider, relevant managers and employee 2.3. Consider job redesign, reduced hours and ***alternative duties*** in the light of medical advice 2.4. Design a rehabilitation/return-to-work program to achieve a successful return-to-work 2.5. Obtain approval for return-to-work program by relevant managers 2.6. Establish rehabilitation program with employee 2.7. Undertake ***risk analysis*** in relation to proposed program and ***mitigate*** risk where appropriate 2.8. Commence program as close to the time of the accident/illness as possible
3. Monitor/evaluate rehabilitation/ return to work program	3.1. Encourage regular feedback/communication between provider, supervising manager and employee 3.2. Organise regular contact and support between provider and employee 3.3. Identify breaches of the return-to-work program and take remedial action promptly 3.4. Refer return-to-work program to ***workers compensation authorities*** where breaches occur 3.5. Modify return-to-work program where appropriate if it is not delivering the required outcomes 3.6. ***Evaluate*** each rehabilitation/return-to-work program at its conclusion and implement recommendations for system improvement where appropriate

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills
• communications skills to discuss health matters sensitively with a range of people and to represent the employer for disputed claims • negotiation skills to negotiate disputed claims • organisational and administrative skills to see that all claims are properly processed and that claimant is clear about what is happening and what to expect.
Required knowledge
• rehabilitation concepts and return-to-work procedures • relevant legislation from all levels of government that affects business operation, especially in regard to workers compensation, occupational health and safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • workers compensation tribunal procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • critical analysis of the organisation's rehabilitation return-to-work programs • assessment of the strengths and weaknesses of the organisation's approach to rehabilitation return-to-work programs • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios

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EVIDENCE GUIDE	
	• assessment of written reports • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of performance in role plays • oral or written questioning to assess knowledge of workers compensation tribunal procedures • review of risk analysis undertakenof a proposed return-to-work program • evaluation of contact and support organised between provider and employee.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Human Resource Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Claims may include:	• sick leave claim/application • workers compensation claims
Rehabilitation provider may be any authorised health professional including:	• case managers • counsellors or psychotherapists • pain or injury management specialists • physiotherapists
Alternative duties may include:	• limited range of duties in their normal job • new position • specific tasks which will not aggravate the injury or condition
Risk analysis means:	• determination of the likelihood of a negative event preventing the organisation meeting its

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RANGE STATEMENT	
	objectives and the likely consequences of such an event on organisational performance
Mitigation means:	• action taken to reduce or eliminate risk identified
Workers compensation authorities means:	• relevant body, court, tribunal or commission having jurisdiction in respect to workers compensation matters
Evaluation means:	• determining the extent to which the program meets its objective in respect to timeframes, success rates, cost and impact on the organisation

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Human Resource Management

Co-requisite units

Co-requisite units		

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BSBHRM510A Manage mediation processes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop, implement and review guidelines and procedures for mediation within an organisation, or on behalf of an organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to human resources practitioners who have a role in the management of mediation within their organisation, or who may work as consultants providing mediation services to organisations. The unit covers the policy framework required for the management of mediation and the skills associated with the provision of mediation. Mediation is a process in which the parties to a dispute, with the assistance of a neutral third party (the mediator), identify the disputed issues, develop options, consider alternatives and endeavour to reach an agreement; the mediator has no advisory or determinative role in regard to the content of the dispute or the outcome of its resolution, but may advise on or determine the process of mediation whereby resolution is attempted. Co mediation is where the neutral third party is a team comprising two or more persons (the mediators).

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop mediation guidelines	1.1. Research and collate history of disputes and dispute resolution within the organisation, including ***triggers for disputes*** 1.2. Consult identified ***key stakeholders*** to determine requirements related to mediation 1.3. Determine mediation requirements within the organisation 1.4. ***Research*** and document ***models and systems for mediation*** 1.5. Identify and document ***parameters for a mediation***

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ELEMENT	PERFORMANCE CRITERIA
	system from consultation and research process 1.6. Draft and validate guidelines for mediation with stakeholders 1.7. Obtain endorsement for guidelines from senior management team 1.8. Circulate guidelines and train mediators in guidelines and procedures
2. Prepare for mediation	2.1. Identify parties in dispute requiring mediation and explain mediation procedure, in accordance with established guidelines 2.2. Obtain agreement and willingness to participate in the mediation process 2.3. Conduct separate interviews with parties in dispute and clarify issues 2.4. ***Verify*** and document position of each party to the dispute 2.5. Determine ***boundaries for allowable options*** in dispute
3. Settle dispute through mediation	3.1. Use a range of ***communication techniques*** to mediate 3.2. Establish mutual agreement between parties in dispute 3.3. Formulate options for resolution of dispute and preferences 3.4. Continue with mediation until agreement is reached or time constraints conclude
4. Finalise and review mediation	4.1. Circulate documented agreements to all parties and complete all documentation required by organisational guidelines 4.2. Review effectiveness of mediation, identify improvements and refine mediation guidelines 4.3. Assess and maintain ***currency of knowledge and skill base*** of mediators

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills
• communication and problem-solving skills to mediate • literacy skills to write guidelines and to document outcomes of mediation.
Required knowledge

• legislation, codes of practice and national standards:
  • Australian Standards
  • industry or professional bodies' codes of practice
  • legislation relating to privacy and confidentiality
  • legislation about equal opportunity and discrimination
• mediation models.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • guidelines for mediation which have been developed, disseminated, monitored and reviewed OR a critical evaluation of existing guidelines detailing the strengths and weaknesses of the approach • effective techniques in mediation of workplace issues • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • records of mediation within privacy and confidentiality provisions • access to feedback from parties involved in mediation within privacy and confidentiality provisions.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples

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EVIDENCE GUIDE	
	are appropriate for this unit: • analysis of responses to case studies and scenarios • analysis of validated mediation guidelines and refinement of these guidelines as necessary • assessment of written reports on mediation • demonstration of techniques in mediation • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of mediation models • review of documentation outlining agreements and the process for circulating these documents • review of documentation outlining models and systems for mediation, and parameters for a mediation system • review of research into the history of disputes and dispute resolution within the organisation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Human Resource Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Triggers for disputes may include:	• appeals, grievances and complaints that have escalated and remain unresolved • industrial disputes • interpersonal or team conflict • misunderstandings about expectations or contractual requirements

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RANGE STATEMENT	
Key stakeholders may include:	• management • partners • staff associations and other work-based groups • staff from other sites or locations • unions
Research into ***models and systems for mediation*** may include:	• Australian Standards • benchmarking exercises • dispute sources and characteristics • internet searches • psychological associations and professional bodies • resolution techniques • textbooks and journals • training programs
Parameters for a mediation system may include:	• code of conduct for mediation • logistics for mediation, including time limits on process, locations used, duration of sessions • number of mediators required within the organisation • privacy and confidentiality provisions • proformas for use in mediation process • rationale for engaging mediation process • recording and reporting requirements • separate discussions with disputing parties and group discussion
Verifying positions of parties to dispute may involve:	• empathic consideration of personal or historical issues that may not relate to the specific dispute, but that may set the scene for it and need to be addressed in order to resolve the specific dispute • expert advice from third parties or other professionals as required • independent verification of claims made by non-involved parties • other action in line with mediation guidelines • research into facts about events, transactions or other information presented
Boundaries of allowable options refers to:	• any existing policies, procedures and processes that place limits on the options that may be formulated in the dispute resolution process
Communication techniques may	• active and involved listening, reframing,

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RANGE STATEMENT	
include:	summarising, reflecting, clarifying, paraphrasing, problem-solving and option-generated listening • techniques to suit the particular flow of the discussions and in response to issues presented, to focus discussions on possible solutions
Currency of knowledge and skill base may be maintained through:	• attendance at workshops or in-service activities • participation in formal and informal networking activities of mediators • undertaking formal training programs

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Human Resource Management

Co-requisite units

Co-requisite units		

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BSBHRM511A Manage expatriate staff

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage Australian staff working in other countries. It covers planning for offshore work, supporting expatriate staff and arranging for the repatriation of expatriate staff. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a managerial role who direct the work of others. They may work in any industry context and with teams of variable sizes. The unit applies to the management of Australian staff who are expatriated to work in overseas offices.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan for offshore work	1.1. Review type of work to be conducted offshore and record ***roles***, ***tasks and responsibilities*** of team members 1.2. Research cultural, linguistic and regulatory differences of offshore work site 1.3. Evaluate Australian and host country taxation law as it affects offshore work 1.4. Review and select options for employment contracts and remuneration arrangements 1.5. Develop selection procedures ensuring ***employee adaptability*** 1.6. Create team and individual work plans and timeframes 1.7. Ensure that necessary work permits, visas and immunisations are obtained and that travel and accommodation arrangements are made 1.8. Plan for required ***technology*** and equipment for offshore team
2. Support expatriate staff to achieve goals	2.1. Arrange for the provision of cultural awareness training and orientation to new work site and living situation 2.2. Provide relevant ***organisational information*** and

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ELEMENT	PERFORMANCE CRITERIA
	clarify performance expectations 2.3. Establish clear procedures for open and honest communication 2.4. Manage team dynamics and support team performance 2.5. Review individual and group performance and provide development opportunities 2.6. Assist in the management of conflict and address disputes and grievances 2.7. Recognise and reward contributions of team members
3. Arrange and evaluate repatriation	3.1. Support staff to plan for repatriation 3.2. Assign work roles and responsibilities to returning staff 3.3. Provide mentoring through transition following return to Australia 3.4. Evaluate effectiveness of management strategies and support for expatriated staff

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - clarify performance expectations
  - debrief and mentor repatriated staff
  - liaise effectively, establish expectations and address differences between staff in other locations
  - provide cultural information
- initiative and enterprise skills to deal with new situations and challenges that emerge with staff in other countries
- learning skills to contribute to learning within the organisation so that staff can effectively operate offshore
- literacy skills to:
  - evaluate taxation law as it affects offshore work
  - review and select options for employment contracts and remuneration

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REQUIRED SKILLS AND KNOWLEDGE
arrangements • develop supporting documentation, such as selection procedures and work plans • oversee the completion of necessary work permits and visas • planning and organising skills to: • schedule work • make necessary arrangements for staff to relocate
Required knowledge
• cross-cultural understanding and understanding of host country regulatory environment • performance management systems • range of technology for offshore communication • recruitment processes • requirements for sending staff offshore, including visa requirements • taxation law in relation to expatriate work

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of a: • plan for managing staff who work offshore • strategy for providing support and managing team conflict to staff working offshore • plan for repatriating staff.
Context of and specific resources for assessment	Assessment must ensure access to: • a workplace or simulated work environment • office equipment and resources • relevant organisational documentation.
Method of assessment	The following assessment methodsare appropriate for this unit:

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EVIDENCE GUIDE	
	• analysis of responses to case studies and scenarios • review of a portfolio of evidence documenting research, planning and implementation of a strategy for managing staff working offshore • oral or written questioning around the management of staff working offshore • observation of presentation of reports to relevant personnel • assessment of reports.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Roles**, **tasks and responsibilities may involve:	• accountabilities • goals and targets • key performance indicators • performance targets or measures • quality standards • reporting lines • task lists.
Employee adaptability may include:	• family circumstances • intercultural sensitivity • language and communication skills • psychopathology • religious beliefs, values and attitudes.
Technology may include:	• computers • digital conferencing systems and software • internet • telecommunications devices.
Organisational	• organisational chart

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RANGE STATEMENT	
information may include:	• annual reports • requirement for protection of intellectual property and trade secrets.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and leadership - management

Co-requisite units

Co-requisite units		

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BSBHRM602B Manage human resources strategic planning

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop, implement and maintain a strategic approach to managing human resources in an organisation. The unit is critical for any human resources manager and should be undertaken after a firm grounding has been established in a range of human resources activities. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to human resources managers or policy and planning staff with specific responsibility for ensuring that the organisation has the structure and staff to meet current and foreseeable business and performance objectives. In most instances this role will be undertaken by someone from a large organisation and will support an established strategic or business plan.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Research planning requirements	1.1. Analyse strategic plans to determine human resource strategic direction, objectives and targets 1.2. Undertake additional environmental analysis to identify ***emerging practices and trends*** that may impact on human resources management in the organisation 1.3. Identify ***future labour needs***, skill requirements and ***options for sourcing labour supply*** 1.4. Consider new technology and its impact on job roles and job design 1.5. Review recent and potential changes to industrial and legal requirements
2. Develop human resources strategic plan	2.1. Consult relevant managers about their human resources preferences 2.2. Agree on human resources philosophies, values and

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ELEMENT	PERFORMANCE CRITERIA
	policies with relevant managers 2.3. Develop ***strategic objectives and targets for human resources*** services 2.4. Examine ***options for the provision of human resources services*** and analyse costs and benefits 2.5. Identify appropriate technology and systems to support agreed human resources programs and practices 2.6. Write strategic ***human resources plan*** and obtain senior management support for the plan 2.7. Develop risk management plans to support the strategic human resources plan
3. Implement human resources strategic plan	3.1. Work with others to see that the plan is implemented 3.2. Monitor and review the plan 3.3. Adapt plan should circumstances change 3.4. Evaluate and review performance against plan objectives

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• literacy skills to:
  • read relevant documentation
  • write plans
• numeracy skills to undertake cost-benefit analysis of available options
• planning and organisational skills to develop and implement plans
• research, learningand analysis skills to ensure necessary information is gathered prior to writing plans

Required knowledge
• human resources practices and functions • impact of technology on job roles • labour market options for sourcing labour supply • requirements of a strategic plan

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of a strategic human resources plan which includes relevant research and data and demonstrates a clear alignment with broader business objectives • implementation and review of the plan.
Context of and specific resources for assessment	Assessment must ensure access to appropriate documentation and resources normally used in the workplace.
Method of assessment	The following assessment methods are appropriate for this unit: • assessment of reports on strategic human resources issues and human resources planning • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • evaluation of strategic objectives and targets for human resources services • review of human resources plan and risk management plans • oral or written questioning to assess knowledge of human resources practices and functions.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and

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RANGE STATEMENT	
regional contexts) may also be included.	
Emerging practices and trends may include:	• ageing workforce • changes in consumer patterns or community expectations • economic trends • labour market trends • multi-generational teams • new products or services • new technologies • political or legislative changes • qualification or educational changes • working internationally.

Future labour needs may include:	• labour required to achieve organisation's strategic objectives, for example:
	  • competency
	  • number
	  • quality
	  • type.

Options for sourcing labour supply refer to:	• employing a range of recruitment options • hiring casual labour • hiring new graduates or trainees • employing off-shore workers • outsourcing • using contractors or consultants.
Strategic objectives and targets for human resources may refer to:	• equal employment opportunity and diversity • human resources information systems • induction • industrial relations • job analysis and design • OHS • performance management • professional development • recruitment and selection • remuneration • staff retention and succession planning.
Options for the provision of human resources services may include:	• external provision by a consultant or contractor • having the work performed elsewhere (outsourcing) • internal human resources provision of the service • internal non-human resources provision of the service

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RANGE STATEMENT	
	• merging of business units.
Human resources plan includes:	• budget • priorities • objectives • timeframes.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce development - human resource management

Co-requisite units

Co-requisite units		

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BSBHRM604A Manage employee relations

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge to develop and maintain a positive and productive workplace environment. It covers all aspects of employee relations impacting on managers at the strategic level.

Application of the Unit

Application of the unit	The unit is designed for non-specialist HR managers and covers the application of the broad range of employee relations activities.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Implement employee relations strategy and policies for own work area	1.1. Ensure ***employee relations*** strategy is consistent with organisational strategic objectives 1.2. Develop ***strategies and policies*** through the application of a risk management approach and extensive consultation and participation by relevant groups and individuals 1.3. Ensure strategy and policies take account of equal opportunity, family/work relationships and promote the absence of discrimination and/or harassment 1.4. Develop ***risk management*** strategies which take account of the withdrawal of labour and other potential outcomes of disputes 1.5. Identify potential areas of conflict (if any) and ensure strategies and policies take account of the objectives of relevant groups and individuals
2. Build and maintain a productive culture	2.1. Negotiate awards, agreements, and contracts which balance organisational objectives and ***employee rights and obligations*** 2.2. Identify and meet all legal and organisational requirements within the ***conditions of employment*** 2.3. Undertake regular and timely consultation and communication with individuals and relevant groups 2.4. Develop policies and practices to facilitate employee recruitment, retention and satisfaction 2.5. Provide induction programs and training to develop competence and confidence, and to ensure work is performed safely and effectively

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ELEMENT	PERFORMANCE CRITERIA
	2.6. Provide opportunities for employees to understand their role and how it contributes to the achievement of organisational objectives 2.7. Develop, regularly review and update individual and team development plans 2.8. Evaluate and revise employee relations policies regularly
3. Resolve employee relations problems	3.1. Establish processes for early intervention to identify and minimise problems or grievances 3.2. Communicate ***problem solving processes*** to, and obtain support from, all relevant groups and individuals 3.3. Provide training to develop competence in conflict management, negotiation and dispute resolution 3.4. Obtain ***specialist*** advice where appropriate or where formal hearings are required 3.5. Ensure processes are fair, equitable and consistent with all relevant awards agreements and legislation 3.6. Ensure problem solving processes provide for external mediation and conciliation, and arbitration where appropriate
4. Manage diversity	4.1. Develop plans for the promotion of ***diversity*** within the organisation 4.2. Openly promote diversity and its benefits within the organisation 4.3. Develop ***education and communication plans*** to promote and encourage diversity 4.4. Develop and implement processes to deal with events which inhibit the organisation from meeting its diversity objectives

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

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REQUIRED SKILLS AND KNOWLEDGE
• communication/consultation skills to ensure all relevant groups and individuals are advised of what is occurring and are provided with an opportunity for input • conflict management skills to mediate, negotiate and/or attempt to obtain consensus between individuals/groups in conflict situations which are dysfunctional in relation to the organisation's performance • networking skills to ensure support from key groups and individuals for concepts/ideas/products/services • risk management skills to analyse, identify and develop mitigation strategies for identified risks.
Required knowledge

• human resource planning
• human resource specialist assistance available
• industrial agreements
• key result areas of the organisation
• organisational plans and objectives (strategic, tactical and operational)
• organisational policies relating to balancing family/work relationships
• organisational support services for employees (external and internal)
• performance measurement systems utilised within the organisation
• relevant legislation from all levels of government that affects business operation such as:
  • award and enterprise agreements and relevant industrial instruments
  • Occupational Health and Safety
  • environmental issues
  • equal opportunity
  • industrial relations
  • anti-discrimination
  • relevant industry codes of practice
• staff development strategies
• unfair dismissal rules and due process.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • While the unit is designed for non-specialist HR managers, there is an expectation that competence will be demonstrated in the implementation of the full range of employee relations activities • Negotiation of employment agreements/contracts and the maintenance of high standards of performance in respect to equal opportunity and the management of diversity are key areas of assessment • Conflict management and early intervention in respect to employee grievances/problems are also key elements of the evidence to be presented during assessment.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on employee relations • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations on employee relations management • oral or written questioning to assess knowledge of human resources function/s being reviewed and policy frameworks • evaluation of research undertaken • review of documentation analysing the strengths and weaknesses of employee relations' policies and strategies • review of documentation of behaviours associated with managing diversity and, resolving employee problems and grievances.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Employee relations includes:	• all of the activities in an organisation which impact on the employees' terms and conditions of employment and their personal well-being and satisfaction with their work environment
Strategies and policies may include:	• discipline • equal opportunity • human resource strategy • induction and training • industrial/labour relations • organisational values statement • performance management • racial discrimination/vilification • remuneration and benefits • selection/recruitment • sexual harassment
Risk management means:	• the process of identification of potential negative events and the development of plans to mitigate or minimise the likelihood of the negative event occurring and/or the consequences in the event it does occur
Employee rights and obligations refers to:	• those contained within any award agreement or contract of employment, or implied terms of those agreements, together with all rights and obligations under the laws of the Commonwealth and the relevant state/territory
Conditions of employment may include:	• grievance procedures • holidays and leave entitlements • hours of work • penalty rates • salary/wages • superannuation
Problem solving processes may include:	• arbitration • conciliation

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RANGE STATEMENT	
	• dispute resolution procedures • grievance procedures • mediation
Specialist means:	• person expert in the conduct of formal hearings in the relevant jurisdiction
Diversity refers to:	• any difference between individuals and groups, and includes age, gender, race, nationality, political and philosophical beliefs, or any other different individual or group characteristic
Education and communication plans refers to:	• a structured program for the dissemination of information, and the receipt of feedback information from individuals, relevant to the process or activity

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Human Resource Management

Co-requisite units

Co-requisite units		

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BSBIND201A Work effectively in a business environment

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to work effectively within a commercial or business environment. It includes identifying the rights and responsibilities of employees and employers and conducting business in accordance with the organisational goals, values and standards. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals developing basic skills and knowledge in preparation for working in a broad range of settings.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Work within organisational requirements	1.1. Identify and read ***organisation's requirements*** and responsibilities and seek advice from ***appropriate persons***, where necessary 1.2. Develop and utilise a current working knowledge and understanding of ***employee and employer rights and responsibilities*** 1.3. Comply with relevant duty of care, legal responsibilities and ***organisational goals and objectives*** 1.4. Identify roles and responsibilities of colleagues and immediate supervisors 1.5. Identify standards and values considered to be detrimental to the organisation and communicate this through appropriate channels 1.6. Identify, recognise and follow ***behaviour that contributes to a safe work environment***
2. Work in a team	2.1. Display courteous and helpful manners at all times 2.2. Complete allocated tasks as required 2.3. Seek assistance when difficulties arise 2.4. Use questioning techniques to clarify instructions or responsibilities 2.5. Identify and display a non-discriminatory attitude in all contacts with staff, management or clients

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ELEMENT	PERFORMANCE CRITERIA
3. Develop effective work habits	3.1. Identify ***work and personal priorities*** and achieve a balance between competing priorities 3.2. Apply time management strategies to work duties 3.3. Observe appropriate dress and behaviour as required by the workplace, job role or customer contact

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to identify work requirements and to process relevant workplace documentation • communication skills to request advice, to receive feedback and to work with a team • problem-solving skills to solve routine problems • technology skills to select and use technology appropriate for a task.
Required knowledge

• key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • occupational health and safety (OHS)
• organisational policies, plans and procedures and how to access them
• terms and conditions of employment.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying, locating and articulating the organisation's requirements including goals and values • work that reflects the relationship between own role and organisational requirements • knowledge of workplace procedures for upholding employee and employer rights and responsibilities.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • observation of demonstrated techniques • evaluation of time management strategies applied to work duties.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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RANGE STATEMENT	
Organisation's requirements may include:	• access and equity principles and practice • anti-discrimination and related policy • business and performance plans • ethical standards • goals, objectives, plans, systems and processes • legal and organisation policies, guidelines and requirements • OHS policies, procedures and programs • quality and continuous improvement processes and standards
Appropriate persons may include:	• colleagues • external organisations • line management • supervisor • those who have the authority to adjust plans
Employee rights and responsibilities may include:	• attendance • confidentiality and privacy of enterprise, client and colleague information • knowing the terms and conditions of own employment • obeying lawful orders • protection from discrimination and sexual harassment • punctuality • right to union representation • safety and care with respect to OHS

Employer rights and responsibilities may include:	• responsibility of providing a safe environment free from discrimination and sexual harassment (refer to relevant state/territory and commonwealth anti-discrimination legislation)
	• right to dismiss employees if employees
	  • are negligent, careless or cause an accident
	  • commit a criminal offence
	  • commit acts of disloyalty such as revealing confidential information

Organisational goals and objectives may include:	• organisational values and behaviours • work procedures and quality assurance manuals • and may be stated or implied by the way the organisation conducts its business including: • business planning

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RANGE STATEMENT	
	• financial performance • flexibility, responsiveness • interpersonal communication • marketing and customer service • organisational values and behaviours • people management • work procedures and/or procedures manuals
Behaviour that contributes to a safe work environment may include:	• discussing and negotiating problems and tasks with other team members • identifying and reporting any risks or hazards • listening to the ideas and opinions of others in the team • sharing knowledge and skills • solving problems as a team • using business equipment according to guidelines

Work and personal priorities may include:	• work/life balance and other commitments, including:
	  • school/homework
	  • home/family/parties/friends
	  • other jobs
	• culture
	• disability

Unit Sector(s)

Unit sector	

Competency field

Competency field	Industry Capability - Industry Context

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Co-requisite units

Co-requisite units		

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BSBIND301A Work effectively in an educational environment

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively apply industry knowledge in educational support roles in an educational environment. This includes applying broad knowledge of the Australian education system and its sectors and specific knowledge of an organisation and job role, working with diversity, and recognising access and equity issues in education. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals providing educational support services at various levels of responsibility in the education industry - they need to apply broad background industry knowledge to their business practice and could be working in a range of education sectors (schools, vocational education and training, higher education, postgraduate education).

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop and maintain knowledge of Australian education system and sectors	1.1. Identify and apply knowledge of the ***Australian education system and its sectors*** 1.2. Identify potential ***student pathways between different sectors*** 1.3. Identify ***types of programs and qualifications*** available in different sectors 1.4. Apply knowledge of educational programs and services offered in a specific educational organisation 1.5. Determine the relationship of ***educational support job roles*** to the ***structure and functions of a specific organisation***, and to related job roles in the organisation 1.6. Apply knowledge of educational terminology and acronyms used in a specific education sector
2. Perform education	2.1. Identify and carry out educational support job roles

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ELEMENT	PERFORMANCE CRITERIA
job role tasks effectively	and responsibilities 2.2. Apply ***values of the organisation*** to educational support job roles 2.3. Identify and follow organisational work procedures, protocols and other guidelines 2.4. Comply with ***legislative and regulatory compliance requirements*** and related organisational policies and procedures 2.5. Improve own performance and career opportunities through identifying and participating in ***learning and development activities*** related to identified needs
3. Work effectively with diversity in an educational context	3.1. Apply an awareness of ***culture*** as a factor affecting the behaviour of students, clients and colleagues 3.2. Conduct all work-related activities in a way which respects the diversity of culture and the ability of students, clients and colleagues 3.3. Communicate effectively and respectfully with students, clients and colleagues from diverse cultures and with diverse abilities
4. Practise inclusivity in an educational context	4.1. Identify ***factors promoting access and equity*** in relation to an educational organisation and educational support job role 4.2. Recognise ***factors potentially impacting on educational access and equity*** 4.3. Apply awareness of access and equity issues to the requirements of specific educational support job role

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to interact effectively in diverse cultural contexts with students, clients, and colleagues • problem-solving skills to distinguish between issues that can be resolved within the parameters of delegated work role authority, and those that must be passed on to higher level personnel • initiative and enterprise skills to clarify instructions

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REQUIRED SKILLS AND KNOWLEDGE
• planning and organising skills to identify and address future skills requirements • self-management skills to perform tasks efficiently and in a timely manner • learning skills to participate in relevant learning and development activities, formal and informal • technology skills to use a computer and other office equipment for the purposes of work role • literacy skills to read and interpret documentation relating to job role, compliance requirements and learning and development planning.
Required knowledge
• the scope of the Australian educational industry and its sectors • a specific educational organisation structure including lines of supervision and management, communication lines, protocols of working relationships with supervisors, managers and other colleagues • standards of performance required of an organisation's employees, responsibilities, duties and tasks involved at the level of a specific work role • the range of educational programs offered in the different sectors and in a specific organisation • the legislative and regulatory requirements relevant to educational administration work role, including occupational health and safety; industrial relations and anti-discrimination • factors affecting educational equity and access in a specific organisation.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • accurately applying information about the Australian education industry sectors and the services, qualifications, student pathways of a specific organisation • performing work-related tasks effectively in line with organisational requirements, in compliance with relevant legislation and regulations, and in a manner which respects and promotes diversity

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EVIDENCE GUIDE	
	• knowledge of relevant legislative and regulatory requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to current relevant reference materials and relevant professional expertise.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's report on how the candidate effectively carries out educational administration job role • demonstration of work-related activities • evaluation of projects, research reports or case study exercises • oral or written questioning to assess knowledge of factors affecting educational equity and access in a specific organisation • review of participation in learning and development activities.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • educational administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Australian education system and	• schools, including: • primary and secondary

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RANGE STATEMENT	

its sectors may include:	• public, private, independent, religious
	• vocational training and education, including:
	  • VET in Schools
	  • technical colleges
	  • apprenticeships
	  • TAFE institutes
	  • private RTOs
	• adult and community education
	• universities and other higher education organisations

Student pathways between different sectors may include:	• school to university • school to vocational training and education • vocational training and education to higher education • school to work • work to vocational training and education • work to higher education • work combined with training and education • apprenticeships to higher level qualifications in vocational training and education
Types of programs and qualifications may include:	• qualifications in the Australian Qualifications Framework • Year 12 Certificates • non-award programs • professional qualifications (such as those for engineers, accountants, barristers)
Educational support job roles may include:	• administrative services • disability support services • information services financial services roles • information technology services • janitorial services • library services • science education support • student support services • technological services support • teacher support
Structure and functions of a specific organisation may include:	• purpose and mission • departments and sections, and their functions • relevant titles and job roles • campus names and locations

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RANGE STATEMENT	
	• lines of management • ownership, decision making and governance
Values of the organisation may include:	• explicit values described in organisational documents • implicit, undocumented organisational cultural values
Legislative and regulatory compliance requirements may include legislation, regulations, industry codes of practice and policy (Federal and State) relevant to:	• anti-discrimination including equal opportunity and equal employment opportunity legislation, disability discrimination legislation and standards, racial intolerance legislation • business compliance • employment, education and training • environmental issues • international education • occupational health and safety • privacy and confidentiality • quality assurance • working with children and young people • workplace employment practices and industrial relations
Learning and development activities may include:	• formal or informal learning activities • learning from peers • mentoring • award and non-award courses and programs
Culture may include shared values and beliefs affecting behaviour, which may be based on factors such as:	• ethnicity, nationality or race • gender • politics • religion • socio-economic background
Factors promoting access and equity may include:	• providing clear opportunities for applicants and enrolled learners to provide information about their needs, and considering these fairly • providing reasonable adjustments to learning activities and assessments to meet individual needs and circumstances (such as those related to disabilities, language and literacy issues) • communicating in a manner that respects all cultures and abilities • ensuring a welcoming environment which recognises and values diversity • providing learning resources that acknowledge

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RANGE STATEMENT	
	and value cultural and individual differences • marketing activities in a manner that encourages all clients to apply and have their application fairly considered • providing easy physical access to educational venues • having policies and practices which encourage under-represented or otherwise disadvantaged individuals or groups to participate in education and to achieve positive educational outcomes • proving fee reductions • providing specific support staff and training all staff in the requirements and practicalities of access and equity • using selection criteria that do not discriminate against clients

Factors potentially impacting educational access and equity may include:	• organisational attitudes, stereotyping and other barriers to access and participation
	• those related to the potential or enrolled student such as:
	  • socio-economic status
	  • cultural 'discomfort', including that based on a lack of familiarity with educational institutions and bureaucratic processes
	  • abilities and disability
	  • age
	  • gender, especially those people seeking to enter non-traditional areas of training
	  • ethnicity, including language and cultural issues

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Industry Capability - Industry Context

Co-requisite units

Co-requisite units		

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BSBIND302A Work effectively in the international education services industry

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide administration services in an international education organisation. Particular emphasis is on workplace practices such as the application of intercultural protocols, cross cultural communication, identification of job role requirements and career planning. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals providing administration services at various levels of responsibility in the international education services industry. They apply broad background industry knowledge to their business practice and could be involved with education programs and projects in organisations from one or more international education sectors (schools, English language training organisations, vocational education and training, higher education, postgraduate education). These organisations could be onshore or offshore and could be public or private.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Access information on work roles and career planning	1.1. Identify information on career prospects in the international education industry from ***appropriate sources*** 1.2. Identify the range of ***work roles*** in international education organisations from appropriate sources 1.3. Identify a ***professional career pathway plan***
2. Interact effectively with clients	2.1. Identify and respect cultural and intercultural protocols of the industry and organisation 2.2. Identify and comply with organisational client services policies and guidelines 2.3. Apply appropriate cross-cultural communication skills in interactions with international clients 2.4. Interact effectively with internal and external clients,

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ELEMENT	PERFORMANCE CRITERIA
	co-workers and the public 2.5. Work effectively in a team
3. Perform work tasks effectively	3.1. Manage time and prioritise work role tasks efficiently and effectively 3.2. Follow organisational work procedures and work behaviour guidelines 3.3. Seek feedback on personal performance in work role from others including ***appropriate organisation officer*** 3.4. Review own performance and identify any areas for improvement
4. Comply with legislative and regulatory requirements	4.1. Identify ***legislative and regulatory compliance requirements and codes*** relevant to work role 4.2. Comply with legislative and regulatory requirements relevant to work role 4.3. Comply with industry codes of practice 4.4. Check validity of work task processes and outcomes in relation to legislative and regulatory compliance and in accordance with organisational procedures
5. Participate in learning to promote career development	5.1. Undertake an audit of relevant work skills, knowledge and attributes 5.2. Determine appropriate ways of bridging gaps in own work skills related to international education work role requirements 5.3. Identify future skills requirements 5.4. Identify and participate in ***professional development*** learning opportunities

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to interact effectively in an intercultural context with clients, potential clients and their significant others, co-workers and other stakeholders • initiative and enterprise skills to clarify instructions through discussion and feedback, and to access and follow organisational policies and procedures

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REQUIRED SKILLS AND KNOWLEDGE
• learning skills to participate in relevant formal and informal professional development • literacy skills to read and interpret documentation relating to job role, career planning, compliance requirements, professional development and to produce documents required by work role • planning and organising skills to identify and address future skills requirements • problem-solving skills to distinguish between issues that can be resolved within own delegated work role authority and those that must be passed on to a higher level • self-management skills to perform tasks efficiently and on time in work role; to identify areas for improvement in own work performance; to adjust work practices to the satisfaction of supervisor or manager • technology skills to use a computer and other office equipment to access information, to produce documents and to communicate in work role.
Required knowledge
• career pathways and roles in the international education services industry • cross-cultural communication and intercultural protocols for dealing with international clients and co-workers relevant to the level of work role • industry codes of practice, in particular the National Code of Practice for Registration Authorities and Providers of Education and Training to Overseas Students • legislative and regulatory requirements relating to international education services provision, work role and responsibilities (e.g. occupational health and safety (OHS), industrial relations and anti-discrimination legislation) • organisational policies, procedures and protocols relevant to work role • range of services offered to clients (internal and external) of an international education organisation • responsibilities, duties and tasks of work role.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential: • performing work tasks related to the international

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EVIDENCE GUIDE	
competency in this unit	education services environment efficiently and effectively according to organisational requirements and values • applying interpersonal and cross-cultural communication skills effectively to international education services work roles • transferring skills and knowledge to a range of work environments and contexts - including a range of work role scenarios in relation to clients from diverse cultures and countries • knowledge of legislative and regulatory requirements relating to international education services provision, work role and responsibilities.
Context of and specific resources for assessment	Assessment must ensure: • access to current relevant reference materials and relevant professional expertise.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of supervisor's reports • analysis of projects, case studies, records and reports developed by the candidate • review of professional career pathway plan • review of audit of relevant work skills, knowledge and attributes • oral or written questioning to assess knowledge of career pathways and roles in the international education services industry.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • educational administration units.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Appropriate sources may include:	• government and private organisations and agencies, professional associations • internet • personnel in international education services organisations e.g. schools, colleges, institutes, universities • relevant publications such as government papers and reports, newspapers, magazines, journals
Work roles may include:	• type and level of jobs being undertaken in international education organisations • typical roles and responsibilities
Professional career pathway plan may include:	• mechanisms for entry to the industry • short-, medium- and long-term goals for progression in the industry
Co-workers may include:	• peers • supervisors or managers • any other person working in the organisation
Appropriate organisation officer may include:	• designated work supervisor • line manager with responsibility for overseeing staff in the work role

Legislative and regulatory compliance requirements and codes may include:	• current relevant legislation, regulations, industry codes of practice and policy (commonwealth and state/territory) relating to:
	  • anti-discrimination including equal opportunity and equal employment opportunity, disability discrimination, racial intolerance
	  • business compliance relevant to work roles
	  • Education Services for Overseas Students (ESOS) Act 2000, subsequent amendments and related legislation
	  • employment, education and training - relevant to onshore and offshore provision
	  • environmental issues

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RANGE STATEMENT	
	• immigration related policies and procedures for example from commonwealth government departments such as Department of Education, Science and Training (DEST), Department of Immigration and Citizenship (DIAC), Department of Health and Ageing (DOHA), Department of Foreign Affairs and Trade (DFAT) • National Code of Practice for Registration Authorities and Providers of International Education and Training • OHS • privacy and confidentiality • Transnational Quality Strategy (2005) • workplace employment practices and industrial relations • National ELT Accreditation Scheme (NEAS) standards for young learners and for teaching English language to international students • quality assurance guidelines set by particular organisations e.g. cultural diversity, equity and access, critical incidents and workplace practices
Professional development may include:	• conferences • learning through any medium • lectures • mentoring activities • seminars • short-, medium- or long-term courses • staff exchange learning that enhances work skills and career progress • workshops

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Industry Capability - Industry Context

Co-requisite units

Co-requisite units		

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BSBINM201A Process and maintain workplace information

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to collect, process, store and maintain workplace information and systems. It also includes the maintenance of filing and records systems. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who perform a range of routine tasks in the workplace, using a limited range of practical skills and fundamental knowledge of information and information systems in a defined context, under direct supervision or with limited individual responsibility.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Collect information	1.1. Collect ***information*** in a timely manner and ensure that it is relevant to organisational needs 1.2. Use ***business equipment/technology*** available in the work area to effectively obtain information 1.3. Apply ***organisational requirements*** relating to security and confidentiality in handling information
2. Process workplace information	2.1. Use business equipment/technology to process information in accordance with organisational requirements 2.2. Process information in accordance with defined timeframes, guidelines and procedures 2.3. Update, modify and file information in accordance with organisational requirements 2.4. Collate and despatch information in accordance with specified timeframes and organisational requirements
3. Maintain information systems	3.1. Maintain information and filing systems in accordance with organisational requirements 3.2. Identify, ***remove*** and/or ***relocate inactive or dead files*** in accordance with organisational requirements 3.3. Establish and assemble new files in accordance with organisational requirements 3.4. Update reference and index systems in accordance with organisational requirements

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to read and understand organisation's recordkeeping and information systems(including classification systems), to follow sequenced written instructions and to comprehend/interpret nature of record content • numeracy skills to sequence and index files • planning skills to organise work priorities and arrangements • problem-solving skills to solve routine problems • technology skills to select and use technology appropriate to maintaining workplace information.
Required knowledge

• key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • occupational health and safety
• organisational policies and procedures relating to collecting and processing workplace information
• organisational recordkeeping/filing systems and security procedures
• organisation's business and structure
• range of filing systems including paper-based and software-based.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • applying organisational policies and procedures for collecting and processing workplace information • accuracy in recording and documenting information • correctly storing, classifying and maintaining documents and records.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of workplace information systems.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of maintenance of information and filing systems • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of the management of information in the workplace.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • general administration units • other information management units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and

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RANGE STATEMENT	
regional contexts) may also be included.	
Information may include:	• computer databases (library catalogue, customer records) • computer files (letters, memos and other documents) • correspondence (faxes, memos, letters, email) • forms (insurance forms, membership forms) • invoices (from suppliers, to debtors) • minutes of meetings • personnel records (personal details, salary rates) • sales records (monthly forecasts, targets achieved)
Business equipment/technology may include:	• answering machine • binder • computer • fax machine • filing systems (manual/computerised/electronic) • photocopier • printer • telephone
Organisational requirements may include:	• despatching and collecting procedures • legal and organisational policies, guidelines and requirements • OHS policies, procedures and programs • procedures for deciding which records should be captured and filed • procedures for updating records • security procedures
Removing inactive or dead files may include:	• compressing computer files prior to archiving • periodically archiving or deleting files • transferring files at regular intervals or routinely checking for dead or inactive files • transferring records from the active filing system to secondary storage
Relocating inactive or dead files may include:	• electronic (email, internet access, diskette, tape, CD-ROM) • microfilm • photographic material

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RANGE STATEMENT	
	• printed material

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Information Management

Co-requisite units

Co-requisite units		

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BSBINM202A Handle mail

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to receive and distribute incoming mail, and to collect and despatch outgoing mail. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who perform a range of routine tasks in the workplace, using a limited range of practical skills and fundamental knowledge of mail handling in a defined context, under direct supervision or with limited individual responsibility.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Receive and distribute incoming mail	1.1. Ensure that ***incoming mail*** is ***checked*** and ***registered*** in accordance with organisational policies and procedures 1.2. Identify titles and locations of company personnel and departments 1.3. Identify and ***distribute urgent and confidential mail*** in accordance with organisational requirements 1.4. ***Sort*** and despatch mail to ***nominated person***/***location*** in accordance with organisational requirements 1.5. Record and/or report ***damaged***, ***suspicious or missing items*** and take ***appropriate action*** in accordance with organisational policies and procedures
2. Collect and despatch outgoing mail	2.1. Collect, check and sort outgoing mail to ensure all items are ***correctly prepared for despatch*** in accordance with organisational policies and procedures 2.2. ***Record*** and ***process*** outgoing ***mail for despatch*** in accordance with ***organisational requirements*** 2.3. Despatch mail to meet designated time lines
3. Organise urgent and same day deliveries	3.1. Evaluate ***delivery options*** and select ***best option*** 3.2. Prepare items for urgent delivery in accordance with

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ELEMENT	PERFORMANCE CRITERIA
	organisational requirements and carrier specifications 3.3. Organise lodgement or pick up of emergency deliveries and follow-up if necessary

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to receive instructions of several steps to complete task, to give information to others, and to consult with or question supervisor and peers to clarify information
- literacy skills to keep records, to check accuracy of written material and to follow policies and procedures
- numeracy skills to check weights and addresses; and to sort, collate and estimate time for mail despatches and bulk mail outs
- problem-solving skills to choose appropriate method for urgent delivery
- technology skills to use electronic mail.

Required knowledge

- Australian geography and postal codes
- key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety (OHS)
- organisational policies and procedures specific to handling electronic mailprocedural requirements for receiving/despatching and prioritising correspondence
- range of mail services available.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • working with a variety of incoming and outgoing mail • applying carriers' and organisational requirements (e.g. postal and courier) • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of correspondence and parcels for sorting and despatch.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of incoming and outgoing mail registers • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of procedural requirements for receiving/despatching and prioritising correspondence.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • general administration units • other information management units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Incoming mail may include:	• confidential/personal • electronic (e.g. faxes, emails to central address) • external • internal • journals/magazines • letters • paper-based • urgent • other forms of correspondence
Checking mail may include:	• enclosures • mail marked confidential, urgent or personal • mail sent express post or registered • mail that has been damaged • mail that looks suspicious
Registering mail may include:	• assigning file number • addressee • condition of mail item (e.g. damaged, no return address) • contents e.g. cheque • date received • sender • subject
Distributing urgent and confidential mail may include:	• immediate, hand delivery, express post, registered • separating and prioritising urgent mail
Sorting mail may include:	• adding a circulation slip • separating by order of importance for each individual • separating internal (organisational) mail and external mail • separating junk mail • separating urgent mail to be distributed first • sorting by departments

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RANGE STATEMENT	
	• sorting by location • sorting by seniority of personnel • sorting invoices, cheques and accounts
Nominated person*/*location may include:	• administrative support person • department • individual addressee
Damaged*, *suspicious or missing items may include:	• mail exposed to weather (e.g. water damage from rain) • mail roughly handled (e.g. broken contents, torn address labels) • mail that looks like it has been interfered with (re-sealed mail) • mail that looks unusual • mail that makes noises • mail that smells strange • pilfered mail (contents may be missing, parcels slit open)
Appropriate action in relation to damaged, missing or suspicious items may include:	• immediately calling supervisor or security staff • contacting sender to ensure everything sent was received • filling out forms for sender's insurance company • negotiating replacement of missing or damaged items with sender • not touching or moving suspicious mail
Correctly preparing items for despatch may include:	• checking enclosures • checking letter and envelope are addressed to same person • checking the address is not obscured • checking letter has been signed • checking return address is included • checking address details and layout are correct • determining most appropriate carrier • ensuring correct requirements for chosen carrier are being followed • preparing bulk mail outs
Recording outgoing mail may include:	• electronic (specialist software, database, spreadsheet systems) • paper-based (mail book, form, file)
Processing mail for despatch may	• calculating and paying for postage

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RANGE STATEMENT	
include:	• DX mail • registering mail
Processing in accordance with ***organisational requirements*** may include:	• addressee/organisation • appropriate carrier (courier, normal mail, express post) • date of despatch • receipts attached where appropriate • reference number • sender • sender's department
Delivery options may include:	• courier • express mail • overnight bag
Best option may include:	• cost • delivery location • nature of contents (bulky, fragile, confidential) • quantity of delivery items • time constraints

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Information Management

Co-requisite units

Co-requisite units		

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BSBINM301A Organise workplace information

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to gather, organise and apply workplace information in the context of an organisation's work processes and knowledge management systems. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge of information management to provide technical advice and support to a team.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Collect and assess information	1.1. Access product and service ***information*** in accordance with ***organisational requirements*** 1.2. Ensure ***methods of collecting information*** are reliable and make efficient use of available time and resources 1.3. Assess information for clarity, accuracy, currency and relevance to intended tasks 1.4. Use ***interpersonal skills*** to access relevant information from teams and individuals
2. Organise information	2.1. Organise information in a ***format*** suitable for analysis, interpretation and dissemination in accordance with organisational requirements 2.2. Use appropriate ***technology***/***systems*** to maintain information in accordance with organisational requirements 2.3. Collate information and materials, and communicate to relevant ***designated persons*** 2.4. Identify difficulties organising and accessing information and solve collaboratively with individuals and team members 2.5. Update and store information in accordance with organisational requirements and systems
3. Review information	3.1. Actively seek ***feedback*** on clarity, accuracy and

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ELEMENT	PERFORMANCE CRITERIA
needs	sufficiency of information to ensure relevance of information and system 3.2. Review the contribution of information to decision making and implement appropriate modifications to collection processes 3.3. Identify future information needs and incorporate in modifications to collection processes 3.4. Document future information needs and incorporate in modifications to reporting processes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to classify and report information • literacy skills to read and understand a variety of texts; and to write, edit and proofread documents to ensure clarity of meaning, accuracy and consistency of information • problem-solving skills to deal with information which is contradictory, ambiguous, inconsistent or inadequate • technology skills to display information in a format suitable to the target audience.
Required knowledge

• key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • occupational health and safety (OHS)
• methods for checking validity of information and its sources
• organisational recordkeeping/filing systems, security procedures and safe recording practices
• policies and procedures relating to distribution of workplace information, and legal and ethical obligations.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • providing accurate information for defined purposes • systematic maintenance and handling of data and documents • using business technology to manage information • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of information documents found in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of organisational recordkeeping/filing systems • analysis of how information and materials were communicated to relevant people • review of documentation outlining future information needs.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBWRT301A Write simple documents • general administration units • other information management units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information may include:	• computer databases (e.g. library catalogue, customer records) • computer files (e.g. letters, memos and other documents) • correspondence (e.g. faxes, memos, letters, email) • financial figures • forms (e.g. insurance forms, membership forms) • invoices (e.g. from suppliers, to debtors) • personnel records (e.g. personal details, salary rates) • production targets • sales records (e.g. monthly forecasts, targets achieved)
Organisational requirements may include:	• code of conduct/code of ethics • information protocols • legal and organisational policies, guidelines and requirements • management and accountability channels • OHS policies, procedures and programs • procedures for updating records • quality assurance and/or procedures manuals • security and confidentiality requirements
Methods of collecting information may include:	• checking research provided by others • checking written material including referrals and client files • classification tools • individual research • information from other organisations • interviews with colleagues/customers

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RANGE STATEMENT	
	• observation and listening • previous file records • questioning (in person or indirect) • recruitment applications and other forms
Interpersonal skills may include:	• consultation methods, techniques and protocols • networking • seeking feedback from group members to confirm understanding • summarising and paraphrasing • using appropriate body language
Format may include:	• adding headers and footers • incorporating graphics and pictures • inserting symbols • using legends • using a particular software application • using tables and charts
Technology may include:	• answering machine • computer • email • fax machine • internet/extranet/intranet • photocopier • shredder • telephone
Systems may include:	• information management systems • knowledge management systems • record management systems
Designated persons may include:	• clients • colleagues • committee • external agencies • line management • statutory bodies • supervisor
Feedback may include:	• audit documentation and reports • comments from clients and colleagues • customer satisfaction questionnaires • quality assurance data • returned goods

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Information Management

Co-requisite units

Co-requisite units		

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BSBINM302A Utilise a knowledge management system

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to access and use a knowledge management system, to input into a knowledge management system, and to contribute to monitoring, reviewing and improving a knowledge management system and work practices. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who apply a broad range of competencies in various work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge of knowledge management to assist in increasing productivity, to improve quality or to recognise the benefits to the organisation through the improved use of knowledge. For the purpose of this unit, knowledge management is defined as the whole range of strategies, methods, activities and techniques used formally and informally by individuals and the organisation (as formalised in a knowledge management system) to identify, collect, organise, store, retrieve, analyse, share and apply knowledge to the work of the organisation.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Access and use knowledge management system	1.1. Access ***knowledge management system*** to assist with specific tasks, in line with system ***procedures*** 1.2. Administer system, in line with procedures
2. Input to knowledge management system	2.1. Gather, analyse and prepare ***inputs*** for contribution to the system, in line with procedures 2.2. Check inputs for clarity, accuracy, currency and relevance 2.3. Make inputs to system, in line with procedures 2.4. Analyse requirements of the system and ensure suggestions for improvements are provided to ***relevant personnel***
3. Review and improve work practices	3.1. Provide feedback about the clarity, accuracy, currency and relevance of the system's output to

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ELEMENT	PERFORMANCE CRITERIA
	relevant personnel 3.2. Document learning resulting from the use of the system 3.3. Improve work practices as a result of learning from the use of the system

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to classify and report information • literacy skills to read and understand a variety of texts; and to write, edit and proofread documents to ensure clarity of meaning, accuracy and consistency of information • problem-solving skills to deal with information which is contradictory, ambiguous, inconsistent or inadequate • technology skills to display information in a format suitable to the target audience.
Required knowledge

• key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  • anti-discrimination
  • ethical principles
  • codes of practice
  • privacy laws
  • occupational health and safety (OHS)
• organisational policies and procedures for knowledge management
• other relevant organisational policies and procedures, for example:
  • commercial confidentiality.
  • customer service
  • information management
• records management.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • making contributions to knowledge management system • records of outcomes resulting from the use of the system • knowledge of organisational policies and procedures for knowledge management.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of information documents found in the workplace • access to system (within privacy and confidentiality provisions).
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation outlining learning resulting from the use of the system • analysis of responses to case studies and scenarios • demonstration of techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • general administration units • other information management units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Knowledge management system may include:	• planned and implemented system • policies • procedures and practices to manage knowledge within the organisation and among relevant stakeholders • protocols

Procedures may include:	• accessible operating instructions
	• accessible user manuals
	• criteria established for selecting and filtering input to the system
	• related policies and procedures covering:
	  • consultation, participation, communication, and written and verbal reporting
	  • documentation
	  • data collection, storage and retrieval
	  • privacy and confidentiality
	  • quality
	  • staff, professional development, training, and coaching and mentoring
	  • work organisation
	• templates for the collection of input to the system

Inputs may be:	• electronic • paper-based • verbal
Relevant personnel may include:	• managers, leaders, supervisors and coordinators • owners • staff, team members and colleagues

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Information Management

Co-requisite units

Co-requisite units		

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BSBINM303A Handle receipt and despatch of information

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to receive and distribute incoming mail, and to collect and despatch outgoing mail. It also covers collating and despatching bulk mail according to Australia Post and AUSDOC specifications.

Application of the Unit

Application of the unit	This unit applies to individuals who, while under supervision, provide services to support legal practitioners. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Receive and distribute incoming mail	1.1. Check and ***register*** incoming mail to ensure accuracy of records 1.2. ***Process court documents*** according to ***firm's policies and procedures*** 1.3. ***Process original documents*** according to the firm's policies and procedures 1.4. ***Process served documents*** according to the firm's policies and procedures 1.5. Identify and ensure understanding of titles and locations of company personnel and departments 1.6. Identify and promptly distribute urgent and confidential mail to the addressee 1.7. Sort mail and despatch to the nominated person/location 1.8. Record damaged, suspicious or missing items and report promptly where necessary
2. Receive and despatch outgoing mail	2.1. Collect outgoing mail from each section of the firm, check and sort all items to ensure they are correctly ***prepared for despatch*** 2.2. Determine the most ***appropriate delivery method*** and select appropriate envelopes and address correctly 2.3. ***Process outgoing mail*** correctly 2.4. Record mail in register

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ELEMENT	PERFORMANCE CRITERIA
	2.5. Sort mail according to carrier 2.6. Despatch mail using the most appropriate delivery method 2.7. Despatch mail to meet designated ***time lines***
3. Collate and despatch documents for bulk mailing	3.1. Estimate quantities/resources/time to complete bulk mailing of documents correctly 3.2. ***Collate*** documents as required 3.3. Sort envelopes and batch in accordance with ***specifications*** 3.4. Employ AUSDOC bulk mail interstate satchels where appropriate 3.5. Self-check numerical information 3.6. Lodge batched items in time for delivery by relevant carrier
4. Organise urgent and same day deliveries	4.1. Weigh, package and address items for urgent delivery 4.2. Determine and select cheapest and ***best option*** for urgent delivery 4.3. Make ***follow-up*** if necessary

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to listen to sequenced instructions of several steps to complete task; to participate effectively in spoken interactions in order to convey actions and outcomes; to consult and question supervisor and peers to clarify status of mail/documents; and to give oral instructions to peers, e.g. about where to locate mail
- literacy skills to follow a firm's policies and procedures; to record incoming and outgoing mail; and to check for accuracy of address details
- numeracy skills to check, weigh and address outgoing mail; to record, sort and collate incoming mail; and to estimate time for mail despatches and bulk mailouts
- problem-solving skills to choose the appropriate delivery method for mail/court documents.

Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE
• accepted codes of conduct including those relating to: • duty of care • ethical behaviour • compliance with reasonable direction • conflict of interest • privacy and confidentiality • use of company property • non-discriminatory practice • Australia Post's batching specifications • criteria for courier selection • firm's policies and procedures • roles and locations of a firm's personnel • scope of legal practitioner/support role, and own responsibilities and obligations to provide legal advice, to complete or sign off on legal work and/or to appear in court as described by relevant jurisdiction/s.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • accurately and promptly registering and distributing incoming mail in accordance with firm's policies and procedures • consistently despatching and registering and outgoing mail in accordance with firm's policies and procedures, carrier's requirements and relevant legislation • routinely checking all details, including addresses, numerical information, spelling and contents of mail for accuracy; proactively seeking clarification from designated person/s and applying correct addressing protocols for despatch with a range of carriers • knowledge of scope of legal practitioner/support role, and own responsibilities and obligations.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • evidence of accurately and promptly registering incoming and outgoing mail in accordance with firm's policies and procedures, carriers requirements and relevant legislation • evidence of consistently distributingincoming mail, including urgent and confidential items, to correct personnel within accepted timelines • evidence of consistently dispatching outgoing mail in time to meet carrier's delivery schedule • evidence of promptly arranging urgent and same day deliveries to meet delivery requirements, taking into account location of recipient • evidence of routinely checking all details, including addresses, numerical information, spelling and contents of mail for accuracy and applying correct addressing protocols for dispatch with a range of carriers • evidence of proactively seeking clarification from designated person/s if unable to resolve any problem appropriately.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of workplace or training environment documentation outlining the processing ofcourt documents • review of documentation outlining the processing of outgoing mail • testimony from team members, colleagues, supervisors or managers • oral or written questioning to assess knowledge of relevant legislation, rules, regulations, codes of practice and research resources.
Guidance information for	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended,

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EVIDENCE GUIDE	
assessment	for example: • other legal administration units • BSBLEG301A Apply knowledge of the legal system to complete tasks.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Register of incoming mail may include:	• diary • electronic register • mail book
Processing court documents may include:	• attaching the date to the document • attaching file matter number to the document • compliance with relevant court regulations • court documentation register
Firm's policies and procedures may include:	• confidential mail procedures • delivery/despatch of urgent mail • mail register • security procedures
Processing original documents may include:	• attaching file matter number to the document • attaching the date to the document
Processing served documents may include:	• following relevant court process regarding serving regulations
Preparing outgoing mail ***for despatch*** will differ according to:	• AUSDOC • Australia Post • carrier requirements • hand delivery
Appropriate delivery method for mail may include:	• airmail • AUSDOC • Australia Post

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RANGE STATEMENT	
	• certified and registered mail • courier • express post • hand delivery
Processing outgoing mail may include:	• collating documents as instructed • making copies of documents as instructed • registering date despatched • registering despatch receipt if appropriate • registering method of despatch • registering receipt and receiver of mail if hand delivered • registering sender, destination and contents
Time lines may differ according to:	• court requirements • despatch method

Document ***collation*** may relate to:	• method of binding, attaching multiple documents
	• multiple recipients of same documents
	• order of collation
	• specific court requirements:
	  • colour of paper
	  • number of copies

Specifications may differ according to:	• AUSDOC sorting specifications • Australia Post sorting specifications • destination of items • number/weight of items
Best option for urgent delivery may include:	• courier • email • facsimile
Follow-up may include:	• ensuring mail is delivered to receiver • providing proof of despatch

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Knowledge Management - Information Management

Co-requisite units

Co-requisite units		

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BSBINM401A IMPLEMENT WORKPLACE INFORMATION SYSTEM

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to implement the workplace information system. It involves the identification, acquisition, initial analysis and use of appropriate information, which plays a significant part in the organisation's effectiveness. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Frontline managers play a significant role in contributing to the organisation's effectiveness in identifying, acquiring, analysing and using appropriate information. At this level, work will normally be carried out within routine and non routine methods and procedures, which require planning and evaluation, leadership and guidance of others, and some discretion and judgement.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify and source information needs	1.1. Determine and locate ***information*** required by teams 1.2. Acquire and review information held by the organisation to determine suitability, accessibility, currency and reliability according to ***organisational policies***
2. Collect, analyse and report information	2.1. Collect information, which is adequate and relevant to the needs of teams, in a timely manner 2.2. Ensure information is in a format suitable for analysis, interpretation and dissemination 2.3. Analyse information to identify and report relevant trends and developments in terms of the needs for which it was acquired
3. Implement information systems	3.1. Implement management information systems effectively to store, retrieve and regularly review data for decision making purposes 3.2. Use ***technology*** available in the work area to manage information effectively

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ELEMENT	PERFORMANCE CRITERIA
	3.3. Submit recommendations for improving the information system to ***designated persons and/or groups***
4. Prepare for information system changes	4.1. Collect information about information system future needs in consultation with ***colleagues***, including those who have a specialist role in resource management 4.2. Ensure estimates of information system future needs reflect the organisation's ***business plans***, and customer and supplier requirements 4.3. Support proposals to secure resources by clearly presenting submissions that describe realistic options, benefits, costs and outcomes 4.4. Prepare team members to work with new technology and information system changes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to work with information, and to research and present information in ways that are appropriate to the work team • technology skills to work with a range of information systems.
Required knowledge

• information management systems and technology that would be associated with the workplace such as:
  • budgets and financial management systems
  • customer information software or records
  • databases
  • personal digital assistant (PDA)
  • product and service information
  • project management software
  • record management systems
  • spreadsheets.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • analysis of the information that is required for the effective functioning of the team's work together • knowledge of the range of information systems that are, or should be, available in the workplace • ability to recognise what information system changes and improvements will be required in the future.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • demonstration of techniques in working with information management systems • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of relevant technology • review of documentation analysing information trends and developments • written reports on future information system needs • review of preparation undertaken for team members to work with new technology and information system changes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Frontline Management.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information may include:	• archived, filed and historical background data • continuous improvement and quality assurance data • data available internally or externally • data shared and retrieved in various forms such as in writing or verbally, electronically or manually • financial and contractual data • marketing and customer-related data • organisational performance data • planning and organisational documents • policies and procedures
Organisational policies may include:	• guidelines for decision making throughout the organisation that link the formulation of strategy with its implementation • sets of accepted actions approved by the organisation • Standard Operating Procedures
Technology may include:	• computerised systems and software such as databases, project management and word processing • telecommunications devices • any other technology used to carry out work roles and responsibilities
Designated persons and/or groups may include:	• groups designated in workplace policies and procedures • managers or supervisors with management roles and responsibilities concerning information systems • other stakeholders accessing the information system such as customers and service providers • other work groups or teams whose work will be affected by the system

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RANGE STATEMENT	
Colleagues may include:	• employees at the same level or more senior managers • occupational health and safety committee members and other specialists • people from a range of social, cultural and ethnic backgrounds and with a range of physical and mental abilities • team members
Business plans may include:	• cash flow projections • long-term budgets/plans • operational plans • short-term budgets/plans • spreadsheet-based financial projections • targets or key performance indicators for production, productivity, wastage, sales, income and expenditure

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBINM501A Manage an information or knowledge management system

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to organise learning to use an information or knowledge management system and to manage the use of the system. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to managers who have responsibility for seeing that key information and corporate knowledge are retained, accessible to others and improve business outcomes. The unit does not address the requirement to select the technical system (software or hardware), which is seen as the role of an information technology specialist, although in some smaller organisations this may be a part of the manager's role.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Organise learning to use information or knowledge management system	1.1. Identify learning needs of ***relevant personnel*** and ***stakeholders*** for input into, and use of, ***an information or knowledge management system*** 1.2. Identify and secure human, financial and physical resources required for ***learning activities*** to use an information or knowledge management system 1.3. Organise and facilitate learning activities 1.4. Promote and support use of the system throughout the organisation 1.5. Monitor and document effectiveness of learning activities
2. Manage use of information or knowledge management system	2.1. Ensure implementation of ***policies and procedures for the information or knowledge management system*** are monitored for compliance, effectiveness and efficiency 2.2. Address implementation issues and problems as they arise

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Monitor integration and alignment with data and information systems 2.4. Collect information on achievement of ***performance measures*** 2.5. Manage contingencies such as system failure or technical difficulties by accessing technical specialist help as required
3. Review use of information or knowledge management system	3.1. Analyse effectiveness of system and report on strengths and limitations of the system 3.2. Review business and operational plan and determine how effectively the system is contributing to intended outcomes 3.3. Make recommendations for improvement to system, policy or work practices

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical and problem-solving skills to ensure the system is working in accordance with organisational expectations and to deal with contingencies
- technology skills to work with and manage the use of the information or knowledge management system.

Required knowledge

- legislation, codes of practice and national standards, for example:
  - privacy and confidentiality legislation
  - freedom of information legislation
  - AS 5037:2005 Knowledge management - A guide
- organisational policies and procedures, for example:
  - records management
  - information management
  - customer service
  - commercial confidentiality
- organisational operations, and existing data and information systems.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • analysis of the strengths and weaknesses of information or knowledge management system/s and evaluation of suitability for a particular work or organisational context • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to system • access to system user feedback.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports reviewing and evaluating information or knowledge management systems • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge of relevant organisational policies and procedures • review of identified learning needs personnel and stakeholders regarding the information or knowledge management system • evaluation of monitoring and documentation about the effectiveness of learning activities • analysis documentation reporting on the strengths and limitations of the system • review of recommendations made for improvements to the system, policy or work practices.
Guidance information for	Holistic assessment with other units relevant to the

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EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant personnel include:	• managers, leaders, supervisors and coordinators • owners • staff, team members and colleagues
Stakeholders include:	• clients and customers • employee representatives • funding bodies • industry, professional and trade associations • regulatory bodies and authorities • sponsors • tenderers, suppliers and contractors
Information or knowledge management is defined as:	• equipment, strategies, methods, activities and techniques used formally and informally by individuals and the organisation to identify, collect, organise, store, retrieve, analyse, share and draw on information and knowledge valuable to the work of the organisation
An information or knowledge management system:	• comprises policies, protocols, procedures and practices to manage information or knowledge within the organisation and among relevant stakeholders
Learning activities include:	• coaching and mentoring programs • help desks • information sessions, briefings, workshops and training programs • paper-based or electronic (including intranet)

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RANGE STATEMENT	
	learning opportunities • use of expert workers such as coaches and mentors to help other personnel use the system
Policies and procedures for the information or knowledge management system cover:	• complying with legislative requirements (such as privacy, confidentiality and defamation requirements) and other policies and procedures • content guidelines • ensuring accuracy and relevance of knowledge input into the system • mechanisms, formats and styles of input to system, including appropriate alternative formats for people with a disability • permissions for input • removing out-of-date, inaccurate and content that is no longer relevant • selecting, maintaining and disposing of knowledge in the system • sharing knowledge in the system
Performance measures include:	• key performance indicators • other systems and measures to enable assessment of how, when, where and why outcomes are being achieved • performance objectives • performance standards (including codes of conduct) • qualitative or quantitative mechanisms to measure individual performance

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

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Co-requisite units

Co-requisite units		

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BSBINM601A Manage knowledge and information

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and maintain information processing systems to support decision making, and to optimise the use of knowledge and learning throughout the organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to people working in management roles who have responsibility for ensuring that critical knowledge and information are readily available to review the organisation's performance and to ensure its effective functioning. Knowledge and information can include business performance data, customer feedback, statistical data and financial data.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Obtain information relevant to business issues	1.1. Review staff and customer feedback and business performance data 1.2. Identify, define and analyse business problems and issues 1.3. Identify information required to reach a decision on problems/issues 1.4. Source and gather reliable information 1.5. Test information for reliability and validity, and reject where contradictory or ambiguous 1.6. Utilise formal and informal networks to access corporate knowledge/memory not held in formal systems and review appropriately
2. Analyse information and knowledge	2.1. Ensure objectives for analyses are clear, relevant and consistent with the decisions required 2.2. Identify patterns and emerging trends correctly and interpret as to cause and effect 2.3. Utilise ***statistical analyses*** and interpretation where appropriate 2.4. Undertake ***sensitivity analysis*** on any proposed options 2.5. Ensure documentation reflects a logical approach to the evaluation of the evidence and conclusions drawn

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ELEMENT	PERFORMANCE CRITERIA
	2.6. Adjust ***management information systems*/*decision support systems*** to meet information processing objectives
3. Take decisions on business issues identified	3.1. Ensure sufficient valid and reliable information/evidence is available to support a decision 3.2. Utilise ***risk management*** plans to determine acceptable courses of action 3.3. Utilise appropriate ***quantitative methods*** to assist decision making 3.4. Consult specialists and other ***relevant groups and individuals*** 3.5. Ensure decisions taken are within the delegation/accountability of the group/individual responsible 3.6. Make decisions in accordance with organisational guidelines and procedures 3.7. Ensure decisions taken are consistent with organisational objectives, values and standards 3.8. Ensure decisions are taken in a timely manner
4. Disseminate information to the organisation	4.1. Ensure advice/information needs are documented and are specific to location, format and time line requirements 4.2. Document information and update databases regularly 4.3. Design and test systems to meet information requirements of decision makers 4.4. Ensure information is up-to-date, accurate, relevant and sufficient for the recipient 4.5. Develop ***communication plans*** and disseminate information 4.6. Adhere to confidentiality/privacy policies in the transmission/release of information/advice 4.7. Review and update communication plans regularly 4.8. Utilise ***technology*** which provides optimum efficiency and quality 4.9. Maintain ***corporate knowledge*** and ensure security

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to identify improvement opportunities in relation to the services/products delivered internally or concepts/ideas in area of expertise • communication and consultation skills to ensure all relevant groups and individuals are advised of what is occurring and are provided with an opportunity for input • quantitative and qualitative research skills to locate and review relevant data and information • technology skills to consider various software and hardware options for storing and accessing data and information.
Required knowledge
• new technologies and their suitability to knowledge and information management • risk management.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documentation which tracks a particular problem/issue through information gathering and analysis, decision making and taking, and dissemination to relevant groups and individuals • development and utilisation of relevant information storage and retrieval systems, as well as accessing informal knowledge and information from informal networks within the organisation • knowledge of new technologies and their suitability to knowledge and information management.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources

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EVIDENCE GUIDE	
	normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on knowledge management and information management • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of information management systems • review of documentation identifying, defining and analysing business problems and issues • evaluation of communication plans • evaluation of the transmission/release of information/advice in terms of adhering to confidentiality/privacy policies.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Advanced Diploma of Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Statistical analyses may include:	• correlation calculations • long-term trend analyses • probability assessment • regulation analyses • short to medium-term trend analyses
Sensitivity analyses means:	• applying 'what if' scenarios to available

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RANGE STATEMENT	
	options
Management information systems means:	• formal systems for collecting, storing and synthesising information to be used in management decision making
Decision support systems are:	• management information systems which include some form of computer-based assistance to decision making (expert systems)
Risk management means:	• process of identification of potential negative events and the development of plans to mitigate or minimise the likelihood or consequences of the negative event if it occurs
Quantitative methods may include:	• dynamic programming • linear programming • queuing theory • simulation • transportation methodology
Relevant groups and individuals means:	• those personnel who have knowledge about the issue being dealt with and the expertise to assist the decision making process
Research may include:	• focus groups • group interviews • individual interviews • surveys
Communication plans means:	• structured program for the dissemination of information and the receipt of feedback information from individuals relevant to the process or activity
Technology may include:	• audio-visual media • internet • intranet • print media • radio • telephone • television
Corporate knowledge may include:	• copyright • intellectual property • technology

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBINN201A Contribute to workplace innovation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to make a pro active and positive contribution to workplace innovation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in any industry or community context, in both small and large organisations. They take a pro active approach to identifying, suggesting and developing ideas about better ways of doing things at a practical operational level in a specific area of activity. While the individual's overall work is undertaken with some supervision and guidance, the nature of this process requires the application of discretion, judgement and effective interpersonal skills. The unit assumes that there is wider organisational and management support for innovation and for individuals at all levels to contribute to the innovation process.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify opportunities to do things better	1.1. Be aware of ***own role*** in workplace innovation 1.2. Pro-actively identify ***opportunities for improvement*** in own area of work 1.3. Gather and review ***information which may be relevant to ideas*** and which might assist in gaining support for ideas
2. Discuss and develop ideas with others	2.1. Identify ***people who could provide input*** into ideas for improvements 2.2. Select the ***best way of approaching people*** to begin sharing ideas 2.3. Seek ***feedback*** on improvement of ideas, and discuss and develop ***options and possible variations*** 2.4. Review and select ideas for follow-up based on feedback and further review
3. Address the	3.1. Take action to implement ***routine changes*** in

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ELEMENT	PERFORMANCE CRITERIA
practicalities of change	consultation with others and within scope of own responsibility 3.2. Identify and articulate ***issues and practical processes*** for implementing proposed ideas 3.3. Present ideas and practical suggestions to the appropriate people about how improvements could be made

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to liaise with other team members, to discuss a range of ideas and to be open to different opinions
- comprehension skills to review and interpret information from a wide range of sources
- organisational skills to articulate practical processes and actions for change
- problem-solving skills to identify and anticipate problems at a practical operational level and to develop possible solutions.

Required knowledge

- role and impact of innovation in the workplace at a practical operational level and the 'bigger picture' for innovation in the relevant work or community context
- role of individuals in suggesting and making improvements and the importance of pro-active involvement
- positive impacts and the challenges of change and innovation
- types of changes that can occur as a result of effective individual participation
- typical reasons why suggested improvements or innovations may not be implemented, including operational and management constraints
- ways in which improvements and change can be suggested to maximise likelihood of support.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • generation of practical ideas in response to a specific workplace situation • effective and open interaction with others to discuss and develop ideas • knowledge and understanding of the role of individuals in contributing to workplace innovation.
Context of and specific resources for assessment	Assessment must ensure: • interaction with others to reflect the collaborative nature of the improvement/innovation process.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • direct observation of the candidate participating in brainstorming, discussions and other collaborative activities to develop ideas • evaluation of candidate's ability to generate ideas to address a range of practical operational situations • evaluation of feedback from other people involved in the collaborative process about the candidate's communication approaches and abilities • oral or written questioning to assess knowledge of the role of innovation, the role of individuals in the innovation process and the types of techniques that can be used.
Guidance information for assessment	Innovation does not occur in isolation. Holistic assessment with other units relevant to the industry sector, workplace and job role is highly recommended.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Own role may relate to:	• current organisational practice in relation to new ideas • knowledge of ways to suggest new ideas • scope of individual discretion and freedom in relation to new ideas • who needs to be involved in the process
Opportunities for improvement may relate to:	• changes in the physical work environment • different storage or maintenance procedures • different ways of communicating within the team • introduction of new technology • job role changes • new customer base • new work practices or services • staffing changes • work processes and procedures
Information which may be relevant to ideas may include:	• examples of similar approaches in other contexts or organisations • media articles about similar ideas • notes about how the idea could improve efficiency or service levels • pricing information
People who could provide input may include those who might:	• challenge and test the ideas • have supervisory or management responsibility • promote the ideas to others • provide technical knowledge • resource the ideas going forward • review any budgetary implications • work in the same area
Best way of approaching people may be influenced by:	• degree of formality required • location of people (e.g. may not be on-site) • need for any supporting documentation

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RANGE STATEMENT	
	• time pressures and priorities
Feedback could be gained in a range of ways and may include:	• asking questions • talking to colleagues or supervisors • using brainstorming techniques • using 'what if' scenarios
Options and possible variations development may occur by:	• considering resources needed • considering time required • taking on board ideas from other people • thinking through all aspects of the ideas • whole new concepts that come out of discussions
Routine changes may include:	• adjustments to work practices with minimal impact on others or within a small team • changes that do not require management approvals • changes that have the support of management and for which authority is given for immediate action to be taken
Issues and practical processes may relate to:	• any approvals required • cost of implementation • internal politics • need for a planned communication approach (internal or external) • personalities and philosophies of others in the workplace • relationship of the idea to organisation priorities

Unit Sector(s)

Unit sector	

Competency field

Competency field	Creativity and Innovation - Innovation

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Co-requisite units

Co-requisite units		

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BSBINN301A Promote innovation in a team environment

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to be an effective and pro active member of an innovative team. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies individuals who play a pro active role in demonstrating, encouraging or supporting innovation in a team environment. The individual may be a team participant or a team leader. The team may 'make itself' or be constructed by others. It may have core members and members who participate at certain times or for particular purposes. It may be permanent or temporary, or come together at different times to work on specific projects. The team could consist of a team of contractors/freelancers, permanent staff, clients and service providers, or any combination of these groups. It may operate within an organisation or across several organisations - or simply across a group of individuals. The key focus of the unit is on what makes for an innovative team, what keeps it working well, how the structure of work can make a difference and what skills and knowledge are needed to maximise opportunities for innovation. Where a greater focus on team leadership is required this unit should be combined with units such as BSBLED401A Develop teams and individuals.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Create opportunities to maximise innovation within the team	1.1. Evaluate and reflect on ***what the team needs and wants to achieve*** 1.2. Check out ***information about current or potential team members' work*** in the context of developing a more innovative team 1.3. Bring people into the team or make suggestions for team members based on what needs to be achieved and the potential for cross-fertilising ideas 1.4. Acknowledge, respect and discuss the ***different ways that different people may contribute*** to building or

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ELEMENT	PERFORMANCE CRITERIA
	enhancing the team
2. Organise and agree effective ways of working	2.1. Jointly establish ***ground rules*** for how the team will operate 2.2. Agree and communicate responsibilities in ways that encourage and reinforce ***team-based innovation*** 2.3. Agree and share tasks and activities to ensure the best use of skills and abilities within the team 2.4. Plan and schedule activities to allow time for thinking, challenging and collaboration 2.5. Establish personal reward and stimulation as an integral part of the team's way of working
3. Support and guide colleagues	3.1. Model ***behaviour that supports innovation*** 3.2. Seek ***external stimuli and ideas*** to feed into team activities 3.3. Pro-actively share information, knowledge and experiences with other team members 3.4. Challenge and test ideas within the team in a positive and collaborative way 3.5. Pro-actively discuss and explore ideas with other team members on an ongoing basis
4. Reflect on how the team is working	4.1. De-brief and reflect on activities and on opportunities for improvement and innovation 4.2. Gather and use feedback from within and outside the team to generate discussion and debate 4.3. Discuss the ***challenges of being innovative*** in a constructive and open way 4.4. Take ideas for improvement, build them into future activities and communicate key issues to relevant colleagues 4.5. Identify, promote and celebrate successes and examples of successful innovation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

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REQUIRED SKILLS AND KNOWLEDGE
• communication skills to work collaboratively as part of a team, to provide guidance and support to others, and to participate in open and constructive discussions • creative thinking skills to generate, explore, test and challenge ideas • learning skills to stretch boundaries of own knowledge and skills • literacy skills to analyse a wide range of information from varied sources • planning and organisational skills to participate in the effective allocation of work in a team context • problem-solving skills to work constructively to overcome issues and challenges of both a practical and conceptual nature and to make ideas become realities • self-management skills to take a pro-active team role and to reflect on own performance in modelling and encouraging behaviour that supports innovation.
Required knowledge
• barriers to innovation that can occur within a team and broader barriers that sometimes hinder innovation • broad concepts of innovation including what innovation is, different types of innovation and the benefits of innovation • characteristics of teams that are more likely to be innovative and characteristics of broader environments that support and encourage innovation • different roles that people may play within a team, how this impacts on the way a team works and what it might achieve • group dynamics in a team.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • active participation in a team where the team takes a pro-active and considered approach to innovation and innovative practice • collaborative and open communication within the team • knowledge and understanding of the internal and external factors that contribute to a team becoming

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EVIDENCE GUIDE	
	and remaining innovative.
Context of and specific resources for assessment	Assessment must ensure: • demonstration of skills as part of a team.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • direct observation of team interactions • evaluation of reports by the candidate or the team (could be oral or written) discussing the ideas, challenges and opportunities associated with teams, and how they can be more innovative • evaluation of feedback from other people in the team about the candidate's communication approaches and abilities • oral or written questioning to assess knowledge of the characteristics of innovative teams, innovation concepts more broadly and they ways in which innovation can be encouraged • review of jointly established 'groundrules' for how the team will operate.
Guidance information for assessment	Innovation does not occur in isolation. Holistic assessment with other units relevant to the industry sector, workplace and job role is highly recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
What the team needs and wants to achieve may relate to:	• addressing particular customer feedback • conceiving and implementing a particular

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RANGE STATEMENT	
	project • developing new services or products • generating ongoing ideas within the work unit • improving budgetary performance • improving or changing work conditions • new ideas that impact beyond the workplace (e.g. that have a broader social or community impact)
Information about current or potential team members' work may relate to:	• interests • lifestyle preferences • past jobs • technical strengths • work preferences • working styles
Different ways that different people may contribute may relate to individual strengths around:	• creating positive energy within the team • fundamental literacy strengths (e.g. particularly strong in visual literacy, written or spoken communication) • generating ideas • networks or spheres of influence • particular ways of thinking • powers of persuasion • problem-solving capacities • specific technical skills or knowledge
Ground rules may relate to:	• boundaries or lack of boundaries for team activities and ideas • confidentiality • copyright, moral rights or intellectual property • regularity of communication • key roles and responsibilities • time lines • ways of communicating
Team-based innovation may be encouraged through:	• accessing training and learning opportunities • enough but not too much guidance and structure • equitable sharing of workload • follow-through with ideas • supportive communication
Behaviour that supports innovation may include being:	• collaborative • equitable

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RANGE STATEMENT	
	• fair • fun • hardworking • reflective • responsible • sympathetic
External stimuli and ideas might be from:	• Australia or overseas • colleagues outside of the team • family and friends • internet • journals • networks or technical experts • other organisations
Challenges of being innovative may relate to:	• budgetary or other resource constraints • competing priorities • organisational culture • problems with breaking old patterns of behaviour or thinking • time pressures

Unit Sector(s)

Unit sector	

Competency field

Competency field	Creativity and Innovation - Innovation

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBINN501A Establish systems that support innovation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to conceptualise and establish new systems that support and encourage innovation in the workplace. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit may apply to individuals working in any community or industry context, in small or large organisations. While managers are often responsible for the development of new systems, depending on the organisation size and the nature of the system being developed, senior operational personnel or internal/external specialists may also undertake this role. Systems are varied in nature and might apply to human resources management, team management, organisational structures, product development, information technology, marketing or training and assessment. The critical focus is on systems conceived and developed with innovation as the key driver.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Research context for new system development	1.1. Explore and analyse the ***impact*** of ***systems*** in the overall context of innovation 1.2. Explore and gain clarity around ***system objectives***, particularly in relation to innovation 1.3. Analyse current organisational systems to identify ***gaps or barriers*** to innovation 1.4. Research and analyse current and emerging information about systems in ***other organisations and contexts*** 1.5. Evaluate the ***resources and other commitment*** required to foster innovation 1.6. Identify ***key stakeholders*** who can play a role in conceptualising or supporting new system ideas
2. Generate system	2.1. Create system concepts that will foster innovation

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ELEMENT	PERFORMANCE CRITERIA
concepts and options	using ***individual and group techniques*** 2.2. Evaluate and discuss a range of ideas with relevant stakeholders 2.3. Clearly articulate the ways in which innovation is better supported by system ideas and options 2.4. Clearly articulate how the system itself is innovative 2.5. Expose ideas and options to ***ongoing testing***, ***exploration and challenge*** 2.6. Select and refine system ideas that meet the workplace requirements and which are both feasible and innovative
3. Develop a plan for the system	3.1. Determine the need for ***specialised assistance*** and integrate into system planning 3.2. Analyse the potential impact of the new system on people, resources and other organisational practices 3.3. Consult with all stakeholders who will be involved with, or affected by, the new system 3.4. Develop an operational plan for the system, with budget, time lines and responsibilities 3.5. Develop a communication strategy to support the introduction of the new system 3.6. Evaluate the coaching and training needs of those who will use the system and plan a learning and development strategy
4. Trial the system	4.1. Present and consult on system proposals with relevant stakeholders 4.2. Analyse and integrate feedback into the system development process 4.3. Determine appropriate context and parameters for the trialling process 4.4. Initiate the trial, taking account of all required consultative, coaching and technical issues 4.5. Monitor and review the trial in relation to its goals for fostering innovation 4.6. Open the improvement process to ongoing collaborative input and challenge 4.7. Adjust system to reflect evaluation feedback

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to conduct potentially complex and challenging negotiations and consultations on new systems development and implementation • creative thinking skills to explore and generate innovative concepts • learning skills to stretch boundaries of own knowledge and skills, and to foster similar approaches in others • literacy skills to analyse and develop potentially complex organisational requirements and documentation for work systems • numeracy skills to develop and interpret financial estimates • planning and organisational skills to plan the implementation of new systems and to organise and implement training and learning activities • research skills to investigate the broader context for system development • self-management skills to take responsibility for driving system development with a focus on innovation
Required knowledge
• concepts and theories of change management, including ways of introducing change in different organisational contexts and change management communication strategies • concepts and theories of innovation and how these link to innovation in practice • in-depth understanding of the ways in which workplace systems can contribute to innovation in the workplace • project planning and management techniques • technical context in which the system is being developed • typical ways in which systems may present barriers to innovation

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and	Evidence of the following is essential:

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EVIDENCE GUIDE	
evidence required to demonstrate competency in this unit	• designing, trialling and reviewing more than one work system that is planned and structured to maximise opportunities for innovation by workers and managers in the workplace • clearly articulating and understanding how and why the work system fosters workplace innovation among workers and managers • knowledge of concepts and theories of innovation.
Context of and specific resources for assessment	Assessment must ensure: • interaction with others to reflect the collaborative nature of systems development and of innovation more broadly • use of current industry technology in the development of systems.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of systems developed by the candidate for a particular workplace context, with a focus on innovation (both in terms of process and outcome) • oral or written questioning to assess knowledge of links between systems and innovation, wider innovation concepts and change management processes • review of analysis of current organisational systems to identify gaps or barriers to innovation • review of operational plan developed for the system • review of communication strategy developed to support the introduction of the new system • evaluation of learning and development strategy for users of the system.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is strongly recommended, for example: • BSBHRM506A Manage recruitment, selection and induction processes • BSBINM601A Manage knowledge and information • BSBINN601B Manage organisational change

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EVIDENCE GUIDE	
	• BSBLED705A Plan and implement a mentoring program.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Impact of systems may be positive or negative and relate to:	• administrative processes • degree of freedom or restriction for individuals, workers and teams • extent of collaboration and cooperation within the organisation • operational procedures • quality of communication channels and processes • quality of the physical environment • responsiveness of the organisation to customer needs.
Systems might relate to:	• human resources • innovation reward systems • learning and development systems • product or service review processes • project management • quality management • team management.
System objectives may include:	• addressing operational or service problems • changing the culture of the organisation • developing workforce skills • diversifying the business • enhancing customer service quality • generating more income • improving competitiveness • reducing operating costs

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RANGE STATEMENT	
	• winning more projects.
Gaps or barriers might relate to:	• differences between management rhetoric and reality • hierarchical system of management • inadequate reporting or recording • managers who do not accept new ideas • overly bureaucratic processes • people not communicating with each other or sharing information • staff not being involved in decisions • teams who work in rigid and inflexible ways.
Other organisations and contexts may be:	• competitor organisations • local, national or international • organisations of similar size or structure • totally different organisations who have developed interesting or successful systems • wider community or business contexts in which innovation occurs.
Resources and other commitment may include:	• financial • human • management commitment • physical • preparedness to change at all levels of the organisation.
Key stakeholders may include:	• boards or committees • customers • government departments or other statutory authorities • management • specialist advisors • work colleagues.
Individual and group techniques may include:	• brainstorming • cost-benefit analysis • flow charts • jotting down words • mind maps • process analysis • review of approaches/procedures used by competitors • strengths, weaknesses, opportunities and

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RANGE STATEMENT	
	threats (SWOT) analysis • value analysis • visual imagining • other creative thinking strategies.
Ongoing testing, ***exploration and challenge*** may include:	• comparing • contrasting • gaining input from those who do not support the concept • playing 'devil's advocate' • seeking objective internal or external review.
Specialised assistance may include:	• external consultants or advisers • internal colleagues with specialist or technical knowledge relevant to the system.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Creativity and Innovation - Innovation

Co-requisite units

Co-requisite units		

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BSBINN502A Build and sustain an innovative work environment

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to create an environment that enables and supports the application of innovative practice. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in leadership or management roles in any industry or community context. The individual could be employed by the organisation, but may also be an external contractor, the leader of a cross organisation team or of a self formed team of individuals. The work group could be permanent or temporary in nature. The unit focuses on the skills and knowledge required to develop and implement a holistic approach to the integration of innovation across all areas of work practice. It also acknowledges the importance of wider contextual evaluation for potential innovations to ensure their value and benefit.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Lead innovation by example	1.1. Make innovation an integral part of ***leadership and management activities*** 1.2. Demonstrate positive reception of ideas from others and provide constructive advice 1.3. Establish and maintain relationships based on mutual respect and trust 1.4. Take considered ***risks*** to open up opportunities for innovation 1.5. Regularly evaluate own approaches for consistency with the wider organisational or project context
2. Establish work practices that support innovation	2.1. Consult on and establish ***working conditions*** that reflect and encourage innovative practice 2.2. Introduce and maintain ***workplace procedures*** that foster innovation and allow for rigorous ***evaluation of innovative ideas*** 2.3. Facilitate and participate in ***collaborative work arrangements*** to foster innovation

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ELEMENT	PERFORMANCE CRITERIA
	2.4. Build and lead teams to work in ***ways that maximise opportunities for innovation***
3. Promote innovation	3.1. Acknowledge suggestions, improvements and innovations from all colleagues 3.2. Find appropriate ***ways of celebrating and promoting innovation*** 3.3. Promote and reinforce the value of innovation according to the vision and objectives of the organisation or project 3.4. Promote and support the evaluation of innovative ideas within the wider organisational or project context
4. Create a physical environment which supports innovation	4.1. Evaluate the ***impact of the physical environment*** in relation to innovation 4.2. Collaborate with colleagues about ideas for enhancing the physical work environment before taking action 4.3. Consider potential for supporting innovation when selecting physical resources and equipment 4.4. Design, fit-out and decorate workspaces to encourage creative mindsets, collaborative working and the development of positive workplace relationships
5. Provide learning opportunities	5.1. Pro-actively share relevant information, knowledge and skills with colleagues 5.2. Provide or encourage ***formal and informal learning opportunities*** to help develop the skills needed for innovation 5.3. Create opportunities in which individuals can learn from the experience of others

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication, consultation and negotiation skills to model and lead, open and collaborative relationships

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REQUIRED SKILLS AND KNOWLEDGE
• comprehension skills to interpret and develop information that may deal with complex ideas and relate to issues both within and outside a given workplace context • planning and organisational skills to implement wide-ranging practical processes and procedures that support innovation • problem-solving skills to assess and respond to challenges and risks around innovation at an operational management level • self-management and learning skills to evaluate and enhance personal effectiveness, and to promote a culture of ongoing learning and development.
Required knowledge
• benefits of providing coaching and learning opportunities in relation to innovation • concept of innovation, what it is and what it means for different people either working independently or within an organisation • context for innovation in the relevant workplace context including core business values, overall objectives, broader environmental context and the need to ensure the value and benefit of innovative ideas and projects • different ways of rewarding performance • factors and tools that can motivate individuals to use creative thinking and apply innovative work practices • legislative framework that impacts on operations in the relevant workplace context • management principles and leadership styles, including the impact of different approaches on innovation • typical challenges and barriers to innovation within teams and organisations, and ways of overcoming these • ways in which workplace climate can affect individual attitudes and performance.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • establishment of procedures and practices (for a project or a workplace) which support and foster innovative work practice and include sound

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EVIDENCE GUIDE	
	evaluation processes • modelling of behaviour that supports innovative work practice • knowledge and understanding of the role of leaders and managers in encouraging innovation, and the issues and challenges associated with building and sustaining an innovative work environment.
Context of and specific resources for assessment	Assessment must ensure: • involvement of a team for which the candidate provides leadership and guidance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of outcomes and processes from activities managed by the candidate, particularly in relation to how innovation and innovative practice was encouraged and supported • oral or written questioning to assess knowledge of ways that innovation can be fostered and the typical challenges and barriers to innovation.
Guidance information for assessment	Innovation does not occur in isolation. Holistic assessment with other units relevant to the industry sector, workplace and job role is highly recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Leadership and management activities may include:	• people management practices • planning processes

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RANGE STATEMENT	
	• regular management meetings • review processes
Risks may include:	• budgetary issues • challenging changes in relationships, work practices and general workplace climate • unforseen impacts of innovative ideas
Working conditions may include:	• family-friendly leave entitlements • flexible working hours • social leave • study leave • time provided for coming up with ideas
Workplace procedures may relate to:	• briefing processes • client relations • performance management • project management • staff meetings • training
Evaluation of innovative ideas may relate to:	• analysing consistency with overall goals, values or vision • assessing resource requirements and practicalities • assessing the potential to find 'champions' or supporters • evaluating the external factors that may impact on the idea • exploring the implications of ideas that may stretch or change existing ways of doing things
Collaborative work arrangements might be:	• cross section • vertical teams • within a section • working with supplier organisations or partner organisations
Ways that maximise opportunities for innovation may relate to:	• collaborating • collecting data • creative thinking • future scanning • getting feedback • making suggestions • networking
Ways of celebrating and	• congratulating the project team

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RANGE STATEMENT	
promoting innovation may include:	• ensuring management acknowledgment • providing a newsletter story about the idea • using the idea to help foster other ideas • well-planned group incentive schemes
Impact of the physical environment may relate to:	• eating areas • extent to which design or style links with declared philosophies or objectives • external areas • general ambience of the work environment • location of different people • presence and ambience of relaxation areas • style of dÃ©cor • use of creative messages or images in the workplace • workspace design and dÃ©cor • workstation arrangements and opportunities for interaction
Formal and informal learning opportunities may include:	• coaching • conferences • formal training courses/programs • information seminars • job rotation • mentoring • online learning

Unit Sector(s)

Unit sector	

Competency field

Competency field	Creativity and Innovation - Innovation

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Co-requisite units

Co-requisite units		

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BSBINN601B Manage organisational change

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to determine strategic change requirements and opportunities; and to develop, implement and evaluate change management strategies. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to managers with responsibilities that extend across the organisation or across significant parts of a large organisation. They may have a dedicated role in human resources management, human resources development, or work in a strategic policy or planning area. The unit takes a structured approach to change management and applies to people with considerable work experience and organisational knowledge.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify change requirements and opportunities	1.1. Identify ***strategic change needs*** through an analysis of organisational objectives 1.2. Review existing policies and practices against strategic objectives to identify change requirements 1.3. Monitor trends in the ***external environment*** to identify events or trends that impact on the achievement of organisation's objectives 1.4. Identify major operational change requirements due to performance gaps, business opportunities or threats, or management decisions 1.5. Review and prioritise change requirements or opportunities with ***relevant managers*** 1.6. Consult specialists and experts to assist in the identification of major change requirements and opportunities
2. Develop change management strategy	2.1. Undertake cost-benefit analysis for high priority change requirements and opportunities 2.2. Undertake risk analysis, identify ***barriers to change***, and agree and record mitigation strategies 2.3. Develop change management project plan 2.4. Obtain approvals from relevant authorities to

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ELEMENT	PERFORMANCE CRITERIA
	confirm the change management process 2.5. Assign ***resources*** to the project and agree reporting protocols with relevant managers
3. Implement change management strategy	3.1. In consultation with relevant groups and individuals, develop communication or education plan to promote the benefits of the change to the organisation and to minimise loss 3.2. Arrange and manage activities to deliver the communication or education plans to relevant groups and individuals 3.3. Consult with relevant groups and individuals for input into the change process 3.4. Identify and respond to barriers to the change according to risk management plans 3.5. Action ***interventions and activities*** set out in project plan according to project timetable 3.6. Activate strategies for embedding the change 3.7. Conduct regular evaluation and review, and modify project plan where appropriate to achieve change program objectives

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- high level interpersonal and leadership skills to obtain acceptance of change processes and to inspire trust
- innovation skills to think laterally and to develop creative means to enable people to accept change positively
- learning skills to enable openness to new ideas and techniques which could contribute to ongoing organisational improvement
- planning and organising skills to sequence events and to enable staff to be clear in times of change or turbulence
- problem-solving skills to identify and respond to barriers to the change and analyse risks
- project management skills to implement the change management strategy
- teamwork skills to consult with relevant groups and individuals for input to the

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REQUIRED SKILLS AND KNOWLEDGE
change process • verbal communication skills to consult with relevant stakeholders and promote the change management plan
Required knowledge
• change management process or cycle • components of a change management project plan • impact of the external environment on change strategies • organisational behaviour • potential barriers to change • range of strategies for embedding change

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of a change process that detailsrationale for the change and its objectives • implementation of a change process • critical evaluation of how the change process was managed • demonstration of techniques for responding to resistance to change.
Context of and specific resources for assessment	Assessment must ensure access to appropriate documentation and resources normally used in the workplace.
Method of assessment	The following assessment methods are appropriate for this unit: • analysis of responses to case studies and scenarios around change management • assessment of reports on change management • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of change management project plan and communication

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EVIDENCE GUIDE	
	or education plans • review of records outlining consultation with relevant groups and individuals for input to the change process • oral or written questioning to assess knowledge of change management strategies.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Strategic change needs may include:	• actions arising from strategic planning activities to bring about major change in the organisation, which may relate to: • people • processes • technology • structure.
External environment may refer to factors that are:	• consumer-driven • ecological • economic • ethical • global • legal • political • social • technological • the drive to corporate sustainability • the move to a knowledge economy • workforce-driven.
Relevant managers may	• affected by the change

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RANGE STATEMENT	
include those:	• holding a leadership position in the organisation • participating in the change project.
Barriers to change may include:	• challenges to group norms or established roles • existing organisational culture • existing reward systems • fear of loss of status, security, power or friends • interdepartmental rivalry or conflict • lack of involvement in the change • low morale • vested interests.
Resources may include:	• contractors • employees and managers • external and internal consultants • financial and budget allocation • hardware and software • physical assets.
Interventions and activities may include:	• action research • career planning • job redesign • sensitivity training • succession planning • surveys (with feedback) • team building • termination or redeployment • training • transition analysis.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Creativity and innovation - innovation

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Co-requisite units

Co-requisite units		

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BSBINN801A Lead innovative thinking and practice

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to generate, lead and sustain innovative organisational thinking and practice. The unit also covers generating innovative thinking and creativity to lead sustainable innovative practices; supporting a culture of innovation; and maintaining a sustained approach to innovative thinking and practice. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who initiate and lead innovation in any industry or community context. Each organisation's thinking and practice will be different depending on its core business, purpose, size, complexity and broader operating context. Leaders encourage innovative thinking and practice in relation to drivers shaping the particular work environment. Managers may use innovative thinking and practice to advance learning and business processes that contribute to organisational strategies, business plans and goals.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Generate innovative thinking and creativity	1.1. Research and use a ***range of techniques and tools*** to generate new ideas and thinking 1.2. Research and analyse trends shaping organisation's current and future thinking and practice 1.3. Introduce and promote creative thinking techniques to foster personal and team innovation 1.4. Evaluate ***overall context*** for individual and collective innovative thinking and creativity 1.5. Research and analyse specific ***conditions for innovation*** and issues that impact on individual and collective innovative thinking and creativity 1.6. Research and review innovation ***drivers*** and ***enablers***
2. Lead innovative	2.1. Develop personal ***leadership style*** to model positive

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ELEMENT	PERFORMANCE CRITERIA
practices	innovative thinking and practice 2.2. Review, challenge and refine own style and practice in relation to modelling and supporting innovation 2.3. Assess and determine the requirements to promote sustainable innovative activity for the operational context and people involved 2.4. Devise and implement most appropriate means to promote knowledge transfer 2.5. Identify, evaluate and manage ***risks*** associated with innovation within an organisation
3. Generate and support a culture of innovation	3.1. Introduce and promote innovative practices, processes, products or services appropriate to audience and organisational requirements 3.2. Establish ways to capture, communicate and share innovative ideas and practices 3.3. Initiate and foster communication, consultation and team development approaches that support innovation 3.4. Identify, assess and provide adequate resources for innovation to occur 3.5. Develop and apply strategies to foster a workplace culture capable of encouraging innovation 3.6. Establish ***mechanisms at system and process*** level that can support innovation
4. Sustain innovative thinking and practice	4.1. Develop strategies to make innovation an integral part of organisational activity 4.2. Develop and monitor processes to ensure ongoing awareness of individual and collective contributions to innovative thinking and practice 4.3. Analyse potential barriers and risks to innovation and devise strategies to respond 4.4. Analyse and reflect on innovation performance as a basis for developing strategies for improvement

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE

Required skills

- communication, consultation and negotiation skills to model and lead open and collaborative relationships
- planning and organisational skills to develop, implement and sustain practical strategies for innovation
- problem-solving skills to assess challenges and risks at a strategic level and to develop appropriate responses
- research and analytical skills to work with structurally intricate and conceptually complex innovation texts and broader industry contexts; and to develop materials which deal with complex ideas and concepts
- self-management and learning skills to evaluate and enhance personal effectiveness, and to promote a culture of ongoing learning and development
- team and leadership skills to generate, promote and sustain innovation in an organisational or community setting
- technology skills to use computers for document production and research of innovative practices and theories

Required knowledge

- current and past theories and thinking about innovation and creativity
- leadership styles including the way that different approaches impact on innovation in organisations, and specific approaches that foster innovation
- legislative framework that affects business operations in a given context, including particular legislation with a direct impact on innovation, for example concerning copyright, trademarks, intellectual property, occupational health and safety (OHS)
- management techniques and tools for the encouragement of creative thinking and for turning good ideas and creative thinking into innovation
- organisational and industry context for innovation including overarching mission, objectives and strategies
- relationship between theory and thinking on innovation and creativity, and applied practice
- risk assessment and management strategies in the context of innovation
- social, political, economic and technological developments that determine the broad context for innovation in the relevant workplace context
- theories, processes and practice of organisational transformation and the management of the stages of change
- typical strategic challenges and barriers to innovation within organisations and ways of overcoming these challenges and barriers

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • comprehensive understanding and application of key concepts, current theories and processes for promoting innovative thinking and practices in an organisational context • critical examination of trends in thinking and emerging practices as they relate to an organisation's current thinking and practices • knowledge of social, political, economic and technological developments that determine the broad context for innovation in the relevant workplace context.
Context of and specific resources for assessment	Assessment must ensure: • assessment over a sufficient timeframe to allow holistic assessment of the candidate's capacity to lead and sustain innovative thinking and practice • opportunities for interaction with others to reflect the collaborative nature of the innovation process • access to current organisational documentation and support materials.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of reports prepared by the candidate to propose strategies and techniques for building innovative thinking and practice within a given organisational context • oral or written questioning to assess knowledge of innovation theory and practice, context for innovation, and factors that affect innovation in a particular organisation.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBINN601B Manage organisational change • BSBLED701A Lead personal and strategic transformation • BSBLED702A Lead learning strategy implementation • PSPMNGT614A Facilitate knowledge management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Range of techniques and tools for creative thinking may include:	• brainstorming • concept maps • creative thinking matrix • DeBono tools (e.g. six hats) • foresight tools • Kirton Adaptation Innovation Inventory • mindmapping (Buzan) • nominal group technique • scenario analysis.
Overall context may include the environment relating to:	• culture • electronic and non-physical context • global • local or regional • national • work group or community.
Conditions for innovation may span causal factors and issues relating to:	• ability to gain and respond to customer feedback • available resources (in all their forms) • business systems

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RANGE STATEMENT	
	• changes to workflow and processes • competency, capability and skills of the workforce • culture and values • economic change • emerging technologies • executive support for innovation • external • globalisation • government regulations, policy or funding initiatives • internal • labour market and industry changes and restructures • learning culture • management practices • new business models • new markets • organisational sociocultural circumstances and issues (for example, within Indigenous organisations) • research and development focus and support • shift to knowledge economy or new economy • structure and design of work in the organisation • technology change and convergence • vision, core purpose and capabilities.
Drivers are factors or changes that impel innovative practice and may include:	• customer expectations • globalisation • market shifts • new legislation (such as compliance) • policies (such as environmental protection) • price and profitability • technology change.
Enablers are factors that help innovation overcome barriers and may include:	• breakthroughs • collaboration • culture • development • intellectual property • inventions • management support

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RANGE STATEMENT	
	• profitability • research • resources • responsiveness • skilled workforce • technology.
Leadership style will usually be differentiated by five classical approaches:	• autocratic (non-participative) • charismatic flexibility • democratic (participative) • laissez faire (free reign) • paternalistic.
Risks may include:	• damage to property/equipment • environmental • market changes • OHS (including disease) • product failure • professional incompetence • resource deficiencies • systems and process failures.
Mechanisms at system and process level may be physical or electronic and relate to:	• customer management • human resources • information technology • learning • market • OHS • operations • planning (strategic and corporate) • quality • research and development • risk • resource management • supply chain management • structural and performance hierarchies (strata).

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Creativity and Innovation - Innovation

Co-requisite units

Co-requisite units		

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BSBINT301B Apply knowledge of the international trade environment to complete work

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to complete work in an international trade context based on a demonstrated knowledge of the international trade environment. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who work under the supervision of a more experienced colleague in various international work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge accessed from a variety of sources both internal and external to the workplace.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify international and Australian regulatory bodies and their roles and responsibilities	1.1. Assess personal knowledge of relevant international and Australian ***regulatory bodies***, their roles and responsibilities and the required skills in applying this knowledge, to determine currency and adequacy 1.2. Identify knowledge and skills gaps 1.3. Seek ***assistance*** as required to identify relevant bodies, their roles and responsibilities and their impact on own work 1.4. Undertake ***learning*** to ensure currency and adequacy of knowledge and skills concerning regulatory bodies, their roles and responsibilities and their impact on own work
2. Identify significant trade routes and modes of transport	2.1. Assess personal knowledge of significant trade routes and modes of transport and the required skills in applying this knowledge, to determine currency and adequacy 2.2. Identify knowledge and skills gaps 2.3. Seek assistance as required to identify significant trade routes and modes of transport, and their impact on own work 2.4. Undertake learning to ensure currency and adequacy of knowledge and skills concerning significant trade routes and modes of transport, and their impact on own work

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ELEMENT	PERFORMANCE CRITERIA
3. Investigate available sources of information about international trade	3.1. Determine specific needs for information 3.2. Access organisation's ***resources*** to meet information requirements 3.3. Use information to address specific work needs and to identify further information requirements 3.4. Access external information ***resources*** to meet further information requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analysis skills to evaluate skill and knowledge gaps • problem-solving skills to identify appropriate sources of information • literacy skills to read a variety of texts and work plans.
Required knowledge
• significant trade routes and modes of transport • relevant international and Australian regulatory bodies, their roles and responsibilities • historical and contemporary context of trade, particularly as this affects Australian trade • internal and external information sources related to regulatory bodies, trade routes and transport modes.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and	Evidence of the following is essential:

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EVIDENCE GUIDE	
evidence required to demonstrate competency in this unit	• determining information needs as assigned by senior members of the organisation • using a variety of internal and external sources to gather information • examples of completed tasks that apply knowledge of international and Australian regulatory bodies, their roles and responsibilities and significant trade routes and modes of transport • carrying out self assessment to address gaps in knowledge or skills.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of case studies relating to international trade scenarios • examples of relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of learning undertaken to ensure currency and adequacy of knowledge and skills. • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge of Australian and international regulatory bodies, significant trade routes and modes of transport
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBINT302B Apply knowledge of legislation relevant to international trade to complete work.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Regulatory bodies may include:	• Australian Customs Service • Australian Federal Police • Australian Quarantine Inspection Service (AQIS) • Australian Taxation Office • relevant Australian government departments or agencies with particular interest in specific trade areas • other comparable national and international regulatory bodies (e.g. International Monetary Fund, World Trade Organization, World Bank, International Chamber of Commerce)
Assistance may include:	• advice from more experienced colleagues, technical experts, internet, intranet, induction kits, internal training materials and programs • consulting technical experts in the industry, professional associations, training providers, government bodies and agencies • using reference material within the organisation from training providers and government bodies and agencies, professional libraries, trade journals
Learning may include:	• coaching and mentoring • formal courses of any length • informal learning through reading, attending conferences, reading trade journals, discussions with colleagues, short course attendance, web browsing, industry seminars
Resources may include:	• external resources • government agencies and publications, copies of legislation and explanatory notes • industry/professional associations • internal resources • internet and organisation's intranet

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - International Business

Co-requisite units

Co-requisite units		

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BSBINT302B Apply knowledge of legislation relevant to international trade to complete work

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to complete work in the context of legislation relevant to international trade. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who work under the supervision of a more experienced colleague in various international work contexts. They may exercise discretion and judgement using appropriate knowledge of legislation relevant to international trade.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify legislative requirements	1.1. Seek ***assistance*** to identify current information about the range of ***legislation*** relating to own work 1.2. Access organisation's procedures and practices to facilitate compliance with relevant legislation and clarify with others in the workplace as required 1.3. Seek assistance in applying relevant legislation to own work
2. Comply with legislative requirements	2.1. Clarify ***compliance requirements*** with ***others within the workplace*** to confirm understanding and ensure consistency of application 2.2. Seek assistance as required to meet compliance requirements while completing assigned tasks 2.3. Check completed assigned tasks with others in the workplace to ensure compliance with legislative requirements
3. Report possible incidents of non compliance	3.1. Determine and clarify workplace procedures for reporting incidents of non-compliance as required 3.2. Report possible incidents of non-compliance in line with workplace procedures 3.3. Use incidents of non-compliance and possible ***implications*** of non-compliance to guide own work practices

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to identify compliance requirements and to act on feedback provided • communication skills to clarify work requirements with colleagues • problem-solving skills to address issues of potential non-compliance.
Required knowledge

• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • Customs Act
  • Dangerous Goods Act
  • International Commercial Terms (INCOTERMS)
  • trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act
  • Trade Practices Act
  • Warsaw Convention
  • World Trade Organization determinations
• organisational policies and procedures relating to compliance
• implications of non-compliance.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • maintaining compliance with regulatory and policy requirements

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EVIDENCE GUIDE	
	• reporting possible incidents of non-compliance • seeking assistance to clarify compliance requirements • knowledge of legislation relevant to international trade and workplace compliance requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples or case studies relating to international trade scenarios • examples of documents normally used in workplaces to check compliance.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • observation of presentations to legislation applying to an international transaction • oral or written questioning to assess knowledge of Australian and international legislation relating to international trade • assessment of written reports about possible incidents of non-compliance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBINT301B Apply knowledge of the international trade environment to complete work.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating

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RANGE STATEMENT	
conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Assistance may include:	• advice from more experienced colleagues, technical experts, internet, intranet, induction kits, internal training materials and programs • consulting technical experts in the industry, professional associations, training providers, government bodies and agencies • using reference material within the organisation from training providers and government bodies and agencies, professional libraries, trade journals
Legislation may include:	• legislation applicable across all organisations such as that relating to occupational health and safety, equal opportunity, anti-discrimination, company law, contract law, consumer law • legislation specific to the organisation's operations and the conduct of international trade operations
Compliance requirements may include:	• audit schedules and cycles • checks and balances • cross-checking • policies and procedures detailing compliance requirements and processes to ensure compliance • sign offs by individual/s responsible for ensuring compliance
Others within the workplace may include:	• customs brokers • more experienced colleagues • supervisor or manager • technical experts • training staff
Implications may include:	• failure to meet deadlines required for cargo movement • fines or penalties • warnings • withdrawal of licences, approvals

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - International Business

Co-requisite units

Co-requisite units		

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BSBINT303B Organise the importing and exporting of goods

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide general assistance to senior staff in organising the importing and exporting of goods. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who work under the supervision of a more experienced colleague in various international work contexts. They may exercise discretion and judgement using appropriate knowledge of requirements for importing and exporting goods. Work may be for an external client or for the organisation in which the individual is employed.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Follow organisational systems and processes for organising the importation and exportation of goods	1.1. Detail goods to be imported or exported according to ***characteristics*** 1.2. Identify and access ***regulations and permits*** relating to international movement of specific goods with assistance of manager, supervisor or more senior personnel 1.3. Research and document required ***processes*** to import or export specific goods as assigned by and under direction of manager, supervisor or more senior personnel 1.4. Seek assistance as required to research import or export requirements
2. Contribute to cost calculations	2.1. Discuss and record components of ***costs*** of importing or exporting specific goods with supervisor or manager 2.2. Make a ***determination of components of costs*** 2.3. Seek assistance as required in assigned tasks related to calculating costs for international movement of goods 2.4. Document costs for international movement of goods in accordance with workplace procedures 2.5. Check cost calculation for accuracy and completeness prior to forwarding to supervisor or manager

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ELEMENT	PERFORMANCE CRITERIA
	2.6. Finalise and recheck any revisions to calculations by self and supervisor or manager
3. Assist in completing required documentation	3.1. Complete and collate required documentation for international movement of goods 3.2. Seek assistance as required in completing and checking documentation 3.3. Check required documents and forward for further checking by supervisor or manager 3.4. Finalise documents and submit or lodge with ***relevant parties*** 3.5. Identify and file copies of required documents in accordance with workplace procedures
4. Communicate with carriers	4.1. Identify customs licensed places and transportation ***services*** to be used in the international movement of goods with assistance of supervisor, manager or more senior personnel 4.2. Ensure ***communication*** facilitates arrangements to move goods within required time lines 4.3. Identify ***problems*** and take actions as required to facilitate resolution 4.4. Follow through arrangements for transportation of goods including arrangements with overseas representatives of carriers to finalisation, including arrival of goods at intended destination and settlement effected to complete the contract 4.5. Seek assistance as required in communicating with carriers

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to read and create documentations relation to the import and export of goods
- numeracy skills to perform cost calculations

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REQUIRED SKILLS AND KNOWLEDGE
• communication skills to resolve disputes or problems with carriers.
Required knowledge

• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • Customs Act
  • Dangerous Goods Act
  • International Commercial Terms (INCOTERMS)
  • trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act
  • Trade Practices Act
  • Warsaw Convention
  • World Trade Organization determinations
• significant trade routes and modes of transport
• international and Australian regulatory bodies and their roles and responsibilities
• organisational policies and procedures relating to business operations in an international trade context
• penalties for incorrect customs declarations.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • providing assistance in the process of both importing and exporting goods • contributing to cost calculations • providing assistance in completing documentation and communicating with carriers • knowledge of legislation, codes of practice and national standards relevant to the work role.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of importing and exporting requirements such as permit forms, and license documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documents outlining required processes to import or export specific goods; documents outlining costs for international movement of goods • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of importing and exporting requirements • assessment of written reports identifying problems and actions taken to facilitate resolution.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other international business units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Characteristics may include:	• country of origin or destination • dangerous goods

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RANGE STATEMENT	
	• description of goods • prohibited or restricted goods • temperature controlled cargo • volume to be imported or exported

Regulations and permits may include:	• those issued by the Australian Government:
	  • Department of Agriculture, Fisheries and Forestry
	  • Department of Defence
	  • Department of the Environment and Heritage
	  • Department of Foreign Affairs and Trade
	  • Department of Health and Ageing
	  • Department of Industry, Tourism and Resources
	  • Office of Film and Literature Classification
	• those issued by the:
	  • Australian Customs Service
	  • Australian Federal Police
	  • Australian Quarantine and Inspection Service (AQIS)
	• other comparable national and international regulatory bodies

Processes may include:	• advice from more experienced colleagues, technical experts, internet, intranet, induction kits, internal training materials and programs • AQIS requirements such as fumigation, quarantine or other • completion of customs declarations • completion of required financial transactions • consulting technical experts in the industry, professional associations, training providers, government bodies and agencies • inspection processes • obtaining necessary permits • transport and warehousing arrangements in country of origin and destination within Australia • using reference material within the organisation from training providers and government bodies and agencies, professional libraries, trade journals

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RANGE STATEMENT	
Costs may include:	• administrative charges for handling of commodities • brokerage fees • charges levied in country of origin • government charges such as duty, tariff, permits, goods and services tax (GST) • insurances • interest on borrowed capital • other fees and charges (local and overseas) • packing, port charges, transport and storage charges (local and overseas)
Determination of components of costs may include:	• advice from supervisor or manager, more experienced colleagues, customs brokers, training staff, technical experts • previous history of international movement of goods involving same or comparable countries • quotation or reference to existing tender or contract • reference material within the organisation, training providers, professional libraries, trade journals or accessing internet or organisation's intranet • tables of fees and charges
Relevant parties may include:	• Australian and international regulatory bodies • client (seller and buyer) • financial institutions • non-regulatory government agencies • other personnel within the organisation
Services may include:	• air freight • ocean freight • rail transport • road transport • warehousing and storage en route
Communication may include:	• electronic data interchange (EDI) • email • fax • interactive services used to communicate with the Australian Customs Service Integrated Cargo System (ICS) • letter • radio

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RANGE STATEMENT	
	• telephone
Problems may include:	• delays in transit at transfer from one mode of transport to another or at international borders • insurance claims as a result of damage to goods during transit • other problems arising due to weather, industrial action, political unrest

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - International Business

Co-requisite units

Co-requisite units		

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BSBINT304B Assist in the international transfer of services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide general assistance to senior staff in the operational aspects of transferring services internationally. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who work under the supervision of a more experienced colleague in various international work contexts. They may exercise discretion and judgement using appropriate knowledge of international services. Work may be for an external client or for the organisation in which the individual is employed.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Clarify services to be transferred internationally	1.1. Determine services to be transferred internationally and clarify with supervisor or manager 1.2. Determine own role in transfer of services internationally from job description, instructions provided and discussion with supervisor or manager
2. Contribute to implementing processes for transfer of services	2.1. Clarify and document preferred and required processes for transfer of services with supervisor or manager 2.2. Obtain required ***permit application forms*** for transfer of services internationally 2.3. Complete permit application forms with assistance as required 2.4. Complete any ***other documents*** required for transfer arrangements with assistance as required and as assigned 2.5. Check documents for accuracy and completeness
3. Contribute to cost calculations	3.1. Discuss and record components of ***costs*** for international transfer of services with supervisor or manager 3.2. Make a ***determination of components of costs***

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ELEMENT	PERFORMANCE CRITERIA
	3.3. Seek assistance as required in assigned tasks related to calculating costs for international transfer of services 3.4. Document costs for international transfer of services in accordance with workplace procedures 3.5. Check cost calculation for accuracy and completeness prior to forwarding to supervisor or manager 3.6. Finalise and recheck any revisions to calculations made by self and supervisor or manager
4. Assist in completing required documentation	4.1. Complete and collate required documentation completed by self and others in the workplace 4.2. Seek assistance as required in completing and checking documentation required for international transfer of services 4.3. Check required documents by self and forward for checking by supervisor or manager 4.4. Finalise, submit to or lodge documents with ***relevant parties*** 4.5. Identify and file copies of documents required for filing according to workplace procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • communication skills to clarify requirements with supervisor or manager • planning and organising skills to meet deadlines • literacy skills to read and create documentation and to obtain permits • numeracy skills to undertake cost calculations.
Required knowledge
• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:

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REQUIRED SKILLS AND KNOWLEDGE
• Customs Act • Dangerous Goods Act • International Commercial Terms (INCOTERMS) • trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act • Trade Practices Act • trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act • Warsaw Convention • World Trade Organization determinations • company history of arranging transfer of services internationally • international and Australian regulatory bodies, their roles and responsibilities • enterprise policies and procedures relating to business operations in an international context.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • providing assistance to arrange for the international transfer of services • contributing to cost calculations • assisting in the completion of documentation • knowledge of legislation, codes of practice and national standards relevant to the work role.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of documentation relating to the transfer of

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EVIDENCE GUIDE	
	goods and services.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of completed permit application forms and other documents required for transfer arrangements • analysis of responses to case studies and scenarios • observation of presentations • oral or written questioning to assess knowledge of key differences between the transfer of goods and the transfer of services • assessment of documented costs for international transfer of services • assessment of submitted or lodged documents.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other international business units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Permit application forms may include:	• payment of charges levied by the Australian government and international governments • permits from regulatory bodies (Australian and international)
Other documents may include:	• marketing information • materials to support transfer of services such as training materials, technical data and

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RANGE STATEMENT	
	information, enrolment forms • quotation proformas • standard contract forms • standard licensing agreements form
Costs may include:	• labour costs including consultancy • licensing fees • marketing costs • materials costs • profit margin • project management costs • setting up costs
Determination of components of costs may include:	• advice from supervisor or manager, more experienced colleagues, customs brokers, training staff, technical experts • previous history of international service transfer involving same or comparable countries • quotation or reference to existing tender or contract • reference material within the organisation, training providers, professional libraries, trade journals, internet or organisation's intranet • tables of fees and charges
Relevant parties may include:	• Australian and international regulatory bodies • client (seller and buyer) • non-regulatory government agencies • other personnel within organisation

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - International Business

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Co-requisite units

Co-requisite units		

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BSBINT305B Prepare business documents for the international trade of goods

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to contribute to the preparation of business documents required for the trade of goods internationally. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who work under the supervision of a more experienced colleague in various international work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge required for the preparation of international trade documentation. Work may be for an external client or for the organisation in which the individual is employed.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify goods to be transported internationally	1.1. Discuss ***requirements*** for transport of goods internationally with supervisor or manager 1.2. Make contributions and suggestions to assist in developing recommended options for arranging international transport of goods based on previous experience 1.3. Record recommendations made for international transport of goods for further investigation
2. Determine method of transport	2.1. Investigate options and requirements for ***method of transport*** 2.2. Determine and document ***suitability and availability*** of recommended transport options 2.3. Forward details of documented options for method of transport for goods to supervisor or manager for selection and approval 2.4. Seek ***assistance*** as required to determine method of transportation
3. Determine packaging and stowage requirements	3.1. Investigate options and requirements for packaging and stowage 3.2. Determine and document suitability and availability

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ELEMENT	PERFORMANCE CRITERIA
	of recommended packaging and stowage 3.3. Forward details of documented options for packaging and stowage of goods to supervisor or manager for selection and approval 3.4. Seek assistance as required to determine packaging and stowage of goods
4. Contribute to cost calculations	4.1. Discuss and record components of ***costs*** for international transportation of goods with supervisor or manager 4.2. Make a ***determination of components of costs*** 4.3. Seek assistance as required in assigned tasks related to calculating costs for international transportation of goods 4.4. Document costs for international transportation of goods in accordance with workplace procedures 4.5. Check cost calculation for accuracy and completeness prior to forwarding to supervisor or manager 4.6. Finalise any revisions to calculations and ensure they are rechecked by self and supervisor or manager
5. Complete required documentation	5.1. Complete and collate required documentation by self and others in the workplace 5.2. Seek assistance as required in completing and checking documentation required for international transportation of goods 5.3. Check required documents by self and forward for checking by supervisor or manager 5.4. Finalise and submit documents to be submitted to or lodged with ***relevant parties*** 5.5. Identify and file copies of documents required for filing in accordance with workplace procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse

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REQUIRED SKILLS AND KNOWLEDGE
backgrounds and people with diverse abilities • analysis skills to evaluate skill and knowledge gaps • planning and organising skills to prepare appropriate documentation within designated time lines • literacy skills to read and produce a variety of documents • numeracy skills to calculate costs.
Required knowledge

• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • Customs Act
  • Dangerous Goods Act
  • International Commercial Terms (INCOTERMS)
  • trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act
  • Trade Practices Act
  • Warsaw Convention
  • World Trade Organization determinations
• significant trade routes and modes of transport relevant to the work role in assisting with operational aspects of international transportation of goods
• international and Australian regulatory bodies, their roles and responsibilities relevant to the work role in assisting with operational aspects of international transportation of goods
• enterprise policies and procedures relating to business operations in an international trade context
• penalties for incorrect customs declarations.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential:

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EVIDENCE GUIDE	
competency in this unit	• providing assistance to arrange for the international transportation of goods • assisting in determining method and costs of transportation, including packaging and stowage requirements • accurate and timely completion of required documentation for submission or lodgement with relevant parties • knowledge of legislation, codes of practice and national standards relevant to the work role.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of documentation relating to the transfer of goods and services.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of investigation of options and requirements for method of transport • review of documentation about suitability and availability of recommended transport options; and documentation about suitability and availability of recommended packaging and stowage • analysis of responses to case studies and scenarios • oral or written questioning to assess knowledge of importing and exporting documentation requirements • assessment of examples of completed documentation required for international trade.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • communication units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Requirements may include:	• designated time lines • destination/origin of goods • handling instructions for cargo (especially for dangerous goods or temperature controlled goods) • mode of transport • nature of goods • other documents specific to goods, country of origin/destination • packaging and stowage, transportation and warehousing instructions • permits from regulatory bodies (Australian and international) • quarantine requirements • separation of dangerous goods in transit
Method of transport may include:	• air freight • rail transport • road transport • shipping • other transport modes • warehousing and stowage en route and at point of destination while awaiting transportation within country of destination
Suitability and availability may include:	• compliance with regulations (e.g. prohibition on air freight of certain classes of dangerous goods) • cost • country of origin/destination and connecting trade routes • specialised transportation requirements (e.g. temperature controlled goods) • travel time • whether option being investigated is available at time and is appropriate for goods to be

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RANGE STATEMENT	
	transported
Assistance may include:	• advice from more experienced colleagues, technical experts, internet, intranet, induction kits, internal training materials and programs • consulting technical experts in the industry, professional associations, training providers, government bodies and agencies • using reference material within the organisation, from training providers and government bodies and agencies, professional libraries, trade journals
Costs may include:	• costs for permits • duty, tariffs • fees and charges levied by regulatory authorities • insurances • interest on borrowed capital • labour costs • profit margin • taxes as applicable • transport and storage costs
Determination of components of costs may include:	• calculation based on standard rates or rates per item/container/tonnage • internet or organisation's intranet • previous history of goods transported internationally to/from same destination/origin • quotation or reference to existing tender or contract • tables of fees and charges
Relevant parties may include:	• Australian and international regulatory bodies • client (seller and buyer) • customs brokers and other external parties assisting in movement of goods • non-regulatory government agencies • other personnel within organisation • transport and warehousing companies

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - International Business

Co-requisite units

Co-requisite units		

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BSBINT306B Apply knowledge of international finance and insurance to complete work requirements

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to apply knowledge of international finance and insurance to complete work requirements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who work under the supervision of a more experienced colleague in various international work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge of international finance and insurance. Work may be for an external client or for the organisation in which the individual is employed.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Maintain currency of knowledge of finance and insurance	1.1. Assess personal knowledge and skills in the area of finance and insurance against needs and ***available standards*** to determine currency and adequacy of own knowledge and skills 1.2. Identify the various insurance types available and their application for international trade 1.3. Identity knowledge and skills gaps 1.4. Undertake ***development*** to ensure currency and adequacy of knowledge and skills in applying finance and insurance to own work
2. Identify information requirements and access available information	2.1. Determine specific needs for information 2.2. Access ***enterprise resources*** to obtain available information 2.3. Check and access information from available resources against specific needs 2.4. ***Access*** further information if required
3. Interpret and analyse available information	3.1. Collect and collate available information for analysis 3.2. Interpret, analyse and process available information to obtain required information 3.3. Seek assistance of enterprise personnel and relevant third parties if required, to interpret, analyse and synthesise required information 3.4. Check outputs of analysis process against required

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ELEMENT	PERFORMANCE CRITERIA
	information and specific needs 3.5. Undertake further research and analysis to meet specific needs if required
4. Apply knowledge to specific international trading operations	4.1. Use outcomes of research and analysis to facilitate international trading operations in compliance with relevant legislation (Australian and international), trade conventions and agreements, and international financing arrangements 4.2. Complete ***documentation*** according to enterprise standards, instructions supplied with document or form, and directions obtained from ***originator*** of form or document 4.3. Check documentation for ***accuracy and correctness*** by self and manager or supervisor as required

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • literacy skills to access and interpret documentation • numeracy skills to ensure accuracy of calculations for fees and charges, currency conversions and payments required • analysis skills to evaluate knowledge and skills gaps • problem-solving skills to identify information requirements.
Required knowledge

• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • contract law
  • Customs Act
  • International Commercial Terms (INCOTERMS)
  • trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act

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REQUIRED SKILLS AND KNOWLEDGE
• Trade Practices Act • Warsaw Convention • World Trade Organization determinations • enterprise policies and procedures relating to international trading operations • financial risk and financing options for mitigating risk • regulatory authorities, their roles in international trade, and penalties for incorrect documentation and declarations • current political events related to countries with which organisation is trading.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • accessing, analysing and applying information related to finance and insurance to international trading operations • completing documentation related to finance and insurance of international trading operations • knowledge of financial risk and financing options for mitigating risk.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of case studies relating to finance and insurance in international trading operations.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

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EVIDENCE GUIDE	
	• review of development taken to ensure currency and adequacy of knowledge and skills in applying finance and insurance to own work • analysis of responses to case studies and scenarios • observation of presentations on financial and insurance requirements for international transactions • oral or written questioning to assess knowledge of importing and exporting requirements • assessment of research undertaken in determining international finance and insurance requirements • assessment of completed documentation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • finance units or other international business units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Available standards may include:	• competency standards • enterprise standards • industry standards • specific training courses related to international trade
Development may include:	• formal training courses • industry-based seminars • information sessions hosted by government departments, industry associations • mentoring/coaching arrangements • reading programs
Enterprise resources may include:	• enterprise knowledge management system • enterprise library or filing system

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RANGE STATEMENT	
	• government publications (Australian and international) • other personnel in the enterprise
Accessing information may include:	• external resources, internet, government agencies • external libraries • information 'hotlines' and 'help desks' • International Chamber of Commerce • specialist external consultants
Documentation may include:	• financial calculations related to taxation, fees, quotations • forms such as insurance claims or applications for policies, banking forms, internal requirements • letters, memos, reports, other internal documents • permit applications with regulatory authorities
Originator of documentation may include:	• external sources including bank or financial institution, insurance broker or agency, regulatory authority • internal sources within organisation
Accuracy and correctness may include:	• accuracy of calculations • correct spelling, grammar and syntax • required format • veracity of information supplied

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - International Business

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Co-requisite units

Co-requisite units		

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BSBINT401B Research international business opportunities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to ascertain the international business opportunities available and the feasibility of a particular opportunity. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who wish to investigate business opportunities outside Australia through offshore licensing. The activity could be undertaken by an owner/manager of a business or someone with a brief to investigate such opportunities. The unit does not cover scanning international markets to choose a country with which to do business. That area is covered in BSBINT403B Research international markets.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify international business opportunities	1.1. Investigate and identify ***business opportunities*** 1.2. Undertake a feasibility study to determine likely ***business viability*** 1.3. Identify ***specialist services*** and sources of advice where required
2. Identify business skills	2.1. Identify and take into account financial and business skills available in the identified country or countries when researching business opportunities 2.2. Access technical competencies required to take up identified business opportunities in the specific country or countries 2.3. Assess personal skills/attributes and match these against those perceived as necessary for a particular business opportunity 2.4. Identify, assess and document ***business risks*** according to resources available

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills
• research and data collection skills to maintain knowledge of potential opportunities • communication and negotiation skills to obtain information on opportunities from colleagues.
Required knowledge

• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • International Commercial Terms (INCOTERMS)
  • trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act
  • Trade Practices Act
  • Warsaw Convention
  • World Trade Organization determinations
• cultural aspects relevant to target markets
• principles of risk management relevant to the business opportunities.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • research that has led to decisions about taking up international business opportunities • accessing different sources of information • documenting outcomes of research

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EVIDENCE GUIDE	
	• knowledge of relevant Australian, international and local legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to relevant workplace documents • access to information sources used by candidate.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of feasibility study to determine likely business viability • analysis of responses to case studies and scenarios • demonstration of research techniques • observation of presentations • oral or written questioning to assess knowledge of cultural aspects relevant to target markets • assessment of documentation about business risks.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • research units or other international business units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Business opportunities may	• amount and types of finance available

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RANGE STATEMENT	
include:	• consideration of applications and costings for trademarks, patents and standards accreditation • expected financial viability • finance required • likely return on investment • returns expected or required by owners • skills of operator • understanding of legal, cultural and other factors unique to the country of business
Business viability may include:	• cost of modifying products and services to meet market requirements • location and/or premises available • market competition • opportunities available • resources available • risk related to a particular business opportunity, especially in regard to occupational health and safety (OHS) and environmental considerations • skills available • timing/cyclical considerations
Specialist services may include:	• accountants • Austrade, state/territory departments and agencies, chambers of commerce • business brokers/business consultants • industry/trade associations • lawyers and providers of legal advice • online gateway

Business risks may include:	• credit/payment risk of exporter not being paid or importer facing additional and unexpected costs associated with one or more of the following risks:
	  • bank risk - financial standing of institutions involved in transaction/s
	  • commercial risk - buyer insolvency
	  • country risk - war/civil unrest/political decisions/economy
	  • exchange rate - exchange rate fluctuations
	  • finance risk - sufficiency of funding
	  • performance risk - exporter/importer ability to deliver

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RANGE STATEMENT	
	• transfer risk - exchange control/trade control • transport risk - loss of or damage to goods • other relevant risks such as: • legal risks associated with tax legislation, overlapping jurisdictions, regulations relevant to trading with international firms • market competition • OHS and environmental considerations • resources available • supply and demand

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - International Business

Co-requisite units

Co-requisite units		

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BSBINT405B Apply knowledge of import and export international conventions, laws and finance

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to maintain currency of knowledge and skills of international conventions, laws and finance in order to apply these to import and export responsibilities. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of international trade who have a requirement to maintain relevant knowledge and skills by recognising the limits of their own experience and knowledge, and organising learning in order to collect, analyse apply and review information required for specific complex tasks or projects.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Maintain currency of knowledge and skills	1.1. Assess personal knowledge of relevant ***international conventions***, ***laws and finance*** and the required skills in applying this knowledge to determine currency and adequacy 1.2. Identify ***skills and knowledge*** gaps 1.3. Undertake ***learning*** to ensure currency and adequacy of knowledge and skills in applying international conventions, laws and finance to own work
2. Identify information requirements and access available information	2.1. Determine specific needs for information 2.2. Access organisation's resources to meet information requirements 2.3. Use information to address specific work needs and to identify further information requirements 2.4. Access ***external information resources*** to meet further information requirements
3. Interpret, analyse and apply available information	3.1. Collect and collate available information for analysis 3.2. Interpret, analyse and process available information to obtain required knowledge 3.3. Seek assistance of specialist experts if required, to interpret, analyse and synthesise required information 3.4. Use information and knowledge to facilitate import and export of goods in compliance with relevant

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ELEMENT	PERFORMANCE CRITERIA
	Australian and overseas legislation, trade conventions and agreements, and international financing arrangements
4. Review research and analysis process	4.1. Use and review information and knowledge to facilitate import and export of goods for effectiveness 4.2. Document review findings for future use in import and export of goods 4.3. Identify skills and knowledge gaps and undertake further learning

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• self-management and analysis skills to identify skill gaps and to manage own learning opportunities • research and data collection skills to maintain knowledge • analysis skills to apply information and knowledge gathered to own work.
Required knowledge

• organisational learning policies and resources
• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • contract law
  • International Commercial Terms (INCOTERMS)
  • trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act
  • Trade Practices Act
  • Warsaw Convention
  • World Trade Organisation determinations

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying ongoing learning needs in relation to international conventions, laws and financial matters that impact on their import/export responsibilities • identifying and using learning opportunities to gain the necessary information • self-management of these learning processes • knowledge of organisational learning policies and resources.
Context of and specific resources for assessment	Assessment must ensure: • access to libraries and other resource collections • access to an actual workplace or simulated environment • access to office equipment and resources • access to relevant workplace documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • assessment of identified skills and knowledge gaps • review of learning undertaken to address skills and knowledge gaps • analysis of responses to case studies and scenarios • observation of presentations on applicable conventions, laws and financial issues related to international transactions • tests to assess knowledge of relevant conventions, treaties, agreements, guidelines, declarations, recommendations, laws.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended,

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EVIDENCE GUIDE	
	for example: • other international business units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

International conventions, ***laws and finance*** may include:	• agreements
	• bilateral free trade agreements
	• conventions
	• declarations
	• economic blocks
	  • ASEAN Free Trade Agreement (AFTA)
	  • Asia-Pacific Economic Cooperation (APEC)
	  • European Union
	  • North American Free Trade Agreement (NAFTA)
	• guidelines
	• international organisations, bodies and legislation
	  • General Agreement on Trade and Tariffs (GATT)
	  • International Air Transport Association
	  • International Chamber of Commerce (ICC)
	  • International Labour Organization
	  • International Maritime Organization
	  • Organisation for Economic Co-operation and Development (OECD)
	  • United Nations
	  • World Trade Organization
	• laws and rules

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RANGE STATEMENT	
	• copyright • fair trading • intellectual property • recommendations • specific countries • treaties
Skills and knowledge about international finance may include:	• banking institutions • business development • capital markets • competition analysis • finance policy and regulation • investment promotion • regional trade organisations • specific international banking process relating to import/exports • ICC • Uniform Customs and Practice for Documentary Credits (UCP) • Uniform Rules for Collections (URC) • Uniform Rules for Bank to Bank Reimbursements Under Documentary Credits (URR)
Learning may include:	• coaching and mentoring • formal courses of any length • informal learning through: • attending conferences/seminars • discussions with colleagues • reading • reading trade journals • short course attendance • web browsing
External information resources may include:	• course providers • government agencies and publications including legislation and explanatory notes • industry and professional associations • internet and the organisation's intranet • libraries and bookshops

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - International Business

Co-requisite units

Co-requisite units		

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BSBINT407B Prepare business advice on export Free on Board Value

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to accurately determine and prepare business advice on the export entry or declaration Free on Broad (FOB) Value on goods exported from Australia. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of international trade who contribute well developed skills to preparing business advice for a client on the FOB value field on an export entry declaration.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify relevant export invoice	1.1. Identify the buyer and seller 1.2. Identify the relevant contract and export invoice 1.3. Consider definitions and ***differences in definitions of FOB value*** in determining FOB value of goods being exported from Australia 1.4. Identify the International Commercial Terms INCOTERMS relevant to the contract 1.5. Identify the party to the sales contract responsible for ***Australian export formalities*** from INCOTERMS
2. Interpret invoice terms and currency	2.1. Identify the components that constitute the price, in Australian or foreign currency, paid or payable and appearing on the invoice 2.2. Identify INCOTERMS relevant to the invoice 2.3. Identify currency used
3. Adjust invoice price	3.1. Identify ***adjustments*** 3.2. Make additions and subtractions to the price
4. Calculate export FOB value, applying currency conversion principles	4.1. Apportion costs against exported goods using ***organisational requirements***/***policies***/***procedures*** 4.2. Apply appropriate rate of exchange
5. Finalise business	5.1. Complete advice on FOB value field on export entry

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ELEMENT	PERFORMANCE CRITERIA
advice on export FOB value	or declaration 5.2. Check calculations for accuracy and verify as required 5.3. Retain and file completed documentation with relevant personnel in the enterprise 5.4. Pass relevant business advice on to the client

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- numeracy skills to calculate FOB value
- learning skills to maintain relevant knowledge of client products and services to be exported.

Required knowledge

- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - Customs Act
  - Australian Harmonized Export Commodity Classification (AHECC) - introduction and explanatory notes
  - INCOTERMS
  - trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act
  - Trade Practices Act
  - contract law
  - World Trade Organisation determinations
- organisational policies and procedures relating to business operations in import/export/customs brokerage/freight forwarding contexts
- penalties and the infringement notice scheme as it applies to goods where the export FOB value is incorrect

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • interpreting a range of export documentation to determine export FOB value as required for goods exported from Australia • documenting export FOB calculation as required by client • knowledge of legislation, codes of practice and national standards relevant to work role.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to relevant workplace documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of advice completed on FOB value field on export entry or declaration • oral or written questioning to assess knowledge of penalties and the infringement notice scheme as it applies to goods where the export FOB value is incorrect • assessment of business advice passed on to the client.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBINT408B Prepare business advice on the taxes and duties for international trade transactions.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Differences in definition of FOB value may include:	• INCOTERMS definition of FOB, which states in part: 'This term can be used only for sea or inland waterway transport. If the parties do not intend to deliver the goods across the ship's rail, the FCA term should be used' • customs definition: 'The total free on board (FOB) value of the goods, including all costs incidental to the sale and delivery of the goods on to the exporting vessels/aircraft'
Australian export formalities may include:	• A2 or B2 Licences, authorisations and formalities • Australian Harmonized Export Commodity Codes
Adjustments may include:	• all costs that exclude international freight and insurance from the price including in the price all costs to bring the goods to the ship or aircraft side when exporting from Australia
Organisational requirements/policies/ procedures refer to:	• factorisation where costs are proportioned over a line value (each line of the invoice for which there is a separate classification) • other relevant requirements outlined in policies and procedures for calculating FOB

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Business Development - International Business

Co-requisite units

Co-requisite units		

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BSBINT408B Prepare business advice on the taxes and duties for international trade transactions

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assess the applicability of the relevant taxes and duties for international trade transactions, and to prepare business advice based on the assessments and calculations undertaken. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of taxes and duties who contribute well developed skills and knowledge to preparing business advice for a client. This unit addresses the application of relevant legislation, determinations, decisions and guidelines pertaining to the Australian Taxation System and Australian Customs regulations to assess the applicability of the GST, Australian Harmonized Export Commodity Codes for tax and duty related to export transactions, and to accurately calculate relevant taxes and duty and to prepare appropriate business advice for a client.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Assess applicability of relevant taxes and duties to international trade transactions	1.1. Research applicability of ***relevant taxes*** and duty to international trade transactions 1.2. Research ***allowable exemptions and specialised schemes*** relating to international taxes or applicability to enterprise operations and specific international trade transactions 1.3. Apply allowable exemptions to trade transactions 1.4. Check accuracy of assessments
2. Calculate taxes and duty	2.1. Identify components of international trade transactions to be included in calculations 2.2. Calculate taxes and duty on international trade transactions 2.3. Check accuracy of calculations
3. Prepare business advice on applicable	3.1. Prepare results of calculations and business advice in

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ELEMENT	PERFORMANCE CRITERIA
taxes and duty	the required format 3.2. Check calculations for accuracy, and seek and obtain verification from ***relevant personnel*** as required 3.3. Pass completed business advice on to client and other relevant personnel as required

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- numeracy skills to perform calculations
- learning skills to maintain relevant knowledge of client products and services to be exported.

Required knowledge

- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - Customs Act
  - Goods and Services legislation
  - other taxation legislation and relevant determinations, decisions and guidelines
  - trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act
  - other applicable legislation
- allowable exemptions and specialised schemes affecting taxes/duty payable on imports/exports.
- exclusions allowable for GST, related taxes and duty
- organisation's policies and procedures relating to import, export and customs brokerage/freight forwarding activity
- penalties for incorrect calculation of taxes/duty payable

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • at least two examples of accurate calculation of GST, other taxes and duty payable across a range of international trade transactions • at least two examples of situations where an assessment of allowable exemptions and/or incentives has been made • records of relevant documentation used in the workplace including examples of completed business advice • knowledge of legislation, codes of practice and national standards relevant to the work role.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation • access to information about applicable taxes and exemptions • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of allowable exemptions and specialised schemes affecting taxes/duty payable on imports/exports • assessment of research into applicability of GST and related taxes and duty to trade transactions • assessment of accuracy of calculations • review of results of calculations and business advice prepared in the required format.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended,

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EVIDENCE GUIDE	
	for example: • BSBINT407B Prepare business advice on export Free on Board Value.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant taxes may include:	• goods and services tax (GST) • luxury car tax (LCT) • wine equalisation tax (WET) • other taxes, duties and tariffs on supplies and importations
Allowable exemptions and specialised schemes may include:	• government initiatives and schemes to promote exports of Australian goods and commodities • Tradex Scheme and other duty drawback schemes which provide for an upfront exemption from customs duty and taxes on imported goods intended for re-export or to be used as inputs to exports
Relevant personnel may include:	• colleagues, for further processing • customs broker • manager, for checking and verification

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Business Development - International Business

Co-requisite units

Co-requisite units		

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BSBINT409B Plan for international trade

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively plan for the international trade of goods. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with the skills and knowledge to evaluate options when planning for the international trade of goods. The planning activity will usually be in the context of providing a preliminary quotation, a quotation, a supplementary advice on a quotation, or when evaluating a freight contract received from a buyer or seller.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Evaluate the most appropriate transport method, route and protection/security options according to cargo and delivery requirements	1.1. Ascertain ***business context*** of cargo movement 1.2. Examine ***factors*** to be considered in route/mode selection 1.3. Evaluate conditions and risks of different routes in relation to delivery requirements 1.4. Utilise resources that provide information on the current service status of particular transport routes
2. Review shipping and airfreight services available for transporting cargo	2.1. Identify ***airlines and air cargo services*** operating in and out of Australia 2.2. Compare configuration and carrying capacity of different types of aircraft 2.3. Identify ***shipping services*** and ***types of ocean vessels*** operating in and out of Australia 2.4. Compare different types of shipping services 2.5. Compare configurations and carrying capacities of different types of ocean vessels
3. Evaluate packing, marking and stowage requirements for a variety of cargo	3.1. Analyse and prepare ***protection***, ***presentation and preservation*** requirements 3.2. Analyse range of ***containers*** available for international cargo and evaluate for use 3.3. Evaluate ***marking requirements*** and prepare correct marking advice 3.4. Identify risk factors in relation to packing and

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ELEMENT	PERFORMANCE CRITERIA
	storing of goods for transportation and select appropriate options
4. Calculate international freight and other shipment costs	4.1. Examine and apply types of rates, volume-to-weight ratio factors, volume rules including rounding off and allowable projections, principles and methods of rating cargo for international carriage by sea 4.2. Take into account, variations in calculating shipping charges caused by surcharges and other variants 4.3. Calculate and compare costs of shipping a variety of goods by the several types of ocean service 4.4. Examine and apply types of rates, volume-to-weight ratio factors, volume rules including rounding off, principles and methods of rating cargo for international carriage by air 4.5. Explain variations in calculating airfreight charges caused by the applicability of TACT rates, fuel surcharges, other variants, and exchange rates 4.6. Calculate and compare costs of shipping a variety of goods by different air cargo services 4.7. Investigate and communicate postal and courier freight rates and size/weight factors and limitations 4.8. Investigate and communicate rates and costs associated with chartering vessels and aircraft 4.9. Investigate and communicate rating principles and methods used in domestic, sea, road, rail and air transport 4.10. Investigate all ***standard and extraordinary ancillary shipment costs*** on a door-to-door basis applicable in each mode 4.11. Investigate and communicate the total cost concept and other factors that may determine whether cargo is carried by air or sea, or a combination of both (multimodal transport)
5. Identify cargo insurance and claim requirements for goods	5.1. Evaluate the need for cargo insurance 5.2. Investigate the ***standard types of cover*** arrangements used by underwriters 5.3. Identify documents to be lodged with carriers, forwarders, insurance underwriters and customs in cargo loss or damage situations and complete for a hypothetical situation

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • planning and organising skills to arrange and coordinate multimodal transport • problem-solving skills to determine best options for international transport.
Required knowledge

• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • Customs Act
  • INCOTERMS
  • international standards for marking cargo and labelling and marking hazardous goods
  • trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act
  • Trade Practices Act
  • contract law
  • Warsaw convention
  • World Trade Organisation determinations
• organisational policies and procedures relating to business operations.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • choosing appropriate transport modes, route and securing options

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EVIDENCE GUIDE	
	• demonstrating successful preparation for the international transport for different types of general cargo • documenting completed quotations, supplementary quotations, budget or expressions of interest prepared for external client or own workplace • knowledge of legislation, codes of practice and national standards relevant to the work role.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to relevant workplace documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of risk factors identified in relation to packing and storing of goods for transportation • analysis of responses to case studies and scenarios • oral or written questioning to assess knowledge of INCOTERMS • assessment of completed documents to be lodged with carriers, forwarders, insurance underwriters and customs in cargo loss or damage situations.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • planning units, management units or other international business units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised

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RANGE STATEMENT	
wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Business context may include:	• preliminary quotation for the seller/buyer prior to negotiation of contract of sale • quotation to seller/buyer • result of receiving freight contract from seller/buyer • supplement to original quotation to note any change in various cost components
Factors may include:	• container rates • costs • delivery schedules • direct shipment • risks of delay and damage • transhipment • volume and weight
Airlines and air cargo services may include:	• consolidation services • courier and charter • full container • loose package • post • schedules services
Shipping services may include:	• break bulk • bulk • charter services • conference lines • full container load (FCL) • less than container load (LCL) - (consolidation/groupage/freight all kinds [FAK]) • non-conference lines • non-vessel operating common carriers (NVOCCs) • parcel post • scheduled services • slot charter operations • tanktainers • tramp

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RANGE STATEMENT	
Types of ocean vessels may include:	• bulk carriers • cellular container ships • combination • conventional • other special purpose ships • roll on/roll off

Protection, ***presentation and preservation*** may include:	• range of specialised materials and accessories available to protect containerised cargo including:
	  • container liners
	  • data loggers
	  • other monitoring and protection equipment
	  • thermal control materials
	  • water absorption devices

Containers may include:	• bags • bales • cartons • cases • drums • lift vans • pallet boxes • pallets • thermal cartons
Marking requirements may include:	• accurate marking to avoid misdirection • international standard cargo marks • international standard labelling and marking for hazardous goods • waterproof inks and labels
Standard and extraordinary ancillary shipment costs may include:	• booking time slots • break bulk fees • consular or other certification • cranage and oversize considerations • customs clearances • dangerous goods • demurrage • document and handling fees • inland haulage • insurance costs • parcel post

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RANGE STATEMENT	
	• perishable goods • permits • port charges • protective packaging and accessories • storage fees
Standard types of cover may include:	• annual policies • open policies • single shipment policies

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - International Business

Co-requisite units

Co-requisite units		

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BSBIPR301A Comply with organisational requirements for protection and use of intellectual property

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assist with the protection and lawful use of an organisation's intellectual property and to avoid intellectual property infringement. It focuses on supporting the maintenance of an organisation's policies and procedures for the protection of intellectual property and avoidance of intellectual property infringement. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who operate in a broad range of work roles and contexts. Their role may include assisting the organisation to comply with intellectual property requirements for the protection and use of intellectual property.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify organisational expectations for complying with intellectual property requirements	1.1. Identify the various types of existing and potential ***intellectual property*** within the organisation 1.2. Identify and access the organisation's intellectual property ***policies***, ***procedures and information*** 1.3. Identify ***own role*** in protecting the organisation's intellectual property, using intellectual property and avoiding intellectual property ***infringement*** 1.4. Provide information and advice to relevant ***internal and external stakeholders*** about how the organisation's intellectual property policies and procedures operate, within limits of job role
2. Support policies and procedures for the protection and use of intellectual property	2.1. Assist with the development and/or implementation of policies and procedures for the ***protection and use*** of the organisation's intellectual property according to the type of protection required 2.2. Assist with the development and/or implementation of policies and procedures to prevent infringement of

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ELEMENT	PERFORMANCE CRITERIA
	others' intellectual property 2.3. Assist in the maintenance of intellectual property policies and procedures 2.4. Contribute to the identification of ***potential problems*** and opportunities for improvement in the operation of the intellectual property policies and procedures and make recommendations to ***appropriate personnel*** for action
3. Contribute to recommendations about non-compliance issues with intellectual property requirements	3.1. Contribute to the identification of any potential ***non-compliance*** or intellectual property infringement issues, either internally or externally 3.2. Contribute to recommendations to appropriate personnel about ***actions*** to overcome non-compliance issues 3.3. Alert appropriate personnel to areas of potential intellectual property infringement or risk

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to provide information to relevant personnel about intellectual property • problem solving skills to identify intellectual property compliance issues • literacy skills to read and interpret procedures and other relevant documentation
Required knowledge
• basic knowledge of types of intellectual property and the key characteristics of each • relevant organisational policies and procedures in relation to intellectual property • the range of intellectual property residing with the organisation • basic knowledge of relevant legislative requirements as they apply to the job role

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification of the different types of intellectual property within the organisation • identification, use and/or maintenance of an organisation's intellectual property policies and procedures • identification of potential non-compliance issues in an organisation
Context of and specific resources for assessment	Assessment must ensure: • access to relevant information about an organisation's intellectual property policies and procedures if applicable, or opportunity to contribute to the development of the policies and procedures
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of a portfolio of evidence • oral or written presentation to stakeholders outlining the organisation's approach to intellectual property protection and infringement avoidance • analysis of case studies identifying potential intellectual property issues and proposed actions
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other administrative units from BSB07

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Intellectual property refers to:	• the output of the mind or intellect rather than tangible objects. It includes:
	  • copyright
	  • trade marks
	  • patents
	  • designs
	  • plant breeder's rights
	  • circuit layout rights
	  • confidential information/trade secrets

Policies, ***procedures and information*** may include:	• intellectual property policy • licensing agreements • procedures for ensuring copyright protection • procedures for registering intellectual property rights • register of intellectual property assets
Own role may include:	• checking that other areas of the organisation are compliant • communicating policy and procedure changes to others • ensuring fees are paid • entering data as it arises • updating schedules and documents as requested e.g. register of intellectual property • keeping up to date with intellectual property issues through subscriptions to intellectual property services, e.g. IP Australia News Alert
Infringement refers to:	• deliberate or inadvertent misuse or non-compliance with legislation, regulation, policy, codes of conduct etc. in relation to intellectual property
Internal and external stakeholders may include:	• internal stakeholders: • other people within the organisation who may be affected by intellectual property, e.g. designers, writers, trainers, marketing staff, researchers whose efforts may

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RANGE STATEMENT	
	produce intellectual property • all employees, who need to be aware of the importance of, and procedures for, intellectual property protection and avoidance of intellectual property infringement • external stakeholders: • contractors • service providers
Protection and use may include:	• copyright for original works under the Copyright Act 1968 • patents for inventions and innovations under the Patents Act 1990 • protection from misleading packaging, advertising, misuse of power in the marketplace etc. under the Trade Practices Act 1974 • registration of business names under Business Names legislation • registration of trade marks under the Trade Marks Act 1995 • registration of new or original designs under the Designs Act 2003 • registration of domain names • licences, agreements or other instruments for the protection or use of intellectual property
Potential problems may include:	• changes to legislation or regulations • aspects of intellectual property not covered by existing procedures • fees not paid by own or external organisation • out of date communication about intellectual property within organisation • expiry of protection period • inappropriate or illegal use of someone else's intellectual property
Appropriate personnel may include:	• manager • supervisor • person in organisation designated as responsible for intellectual property
Non-compliance issues may include:	• required fees not being paid, both to or from another body, e.g. for a licence agreement or for renewal of registered rights

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RANGE STATEMENT	
	• material being copied by other employees, e.g. from the internet or copying software, which could have potential copyright issues • evidence of unlawful access to computer files • marketing material being produced using images and other material which could breach copyright • unlawful use of music or sound recordings
Actions may include:	• reporting non-compliance issues to supervisor • taking administrative action within job role, e.g. paying relevant fees • ensuring a copyright notice is placed on all publications (e.g. the copyright symbol Â©, name of the copyright owner, year of creation or first publication)

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Intellectual Property

Co-requisite units

Co-requisite units		

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BSBIPR401A Use and respect copyright

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to use and respect copyright. It covers maintaining control over the copyright owner's work, commercialising copyright material, preventing the unauthorised use of an original work, and using other party's original work legitimately. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to people who may be authors, creators or other owners of works covered by copyright. It also applies to employees who have a role in ensuring that their organisation's copyright is protected and/or that their organisation uses others' copyright appropriately to benefit the organisation without infringing the rights of copyright owners. These people may work in a wide range of industry and business contexts.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify extent of copyright protection for original works	1.1. Research ***copyright*** and its application to original works 1.2. Identify ***legislative requirements*** governing copyright 1.3. Determine the ***copyright owner*** of original works within or used by the organisation 1.4. Research the ***rights of the copyright owner***, including ***moral rights*** 1.5. Determine whether a ***copyright notice*** is required 1.6. Identify ***sources of information and advice*** regarding copyright issues and use copyright professionals where required
2. Ensure that copyright protection is effective when using	2.1. Identify material within the organisation that may attract copyright 2.2. Identify and review organisation ***policies and***

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ELEMENT	PERFORMANCE CRITERIA
original works	***procedures*** to ensure that own and others' original works are protected against ***direct*** or ***indirect infringement*** of copyright 2.3. Implement policies and procedures to protect the organisation's copyright, recognising exceptions that allow the legitimate use of own copyright material by others 2.4. Provide advice to relevant personnel about the legal and economic ***implications of copyright infringement*** 2.5. Evaluate and make recommendations for the ***commercialisation potential*** of copyright material 2.6. Research issues that need to be considered when licensing or selling copyright rights, including the use of ***copyright collection societies***
3. Monitor policies and procedures for use of own copyright materials by other parties	3.1. Monitor policies and procedures to ensure that the organisation's copyright is respected ***locally*** and ***internationally*** 3.2. Create and maintain documentation in relation to copyright agreements where established 3.3. Implement ***procedures to limit or deter infringement*** of organisation's copyright and/or encourage the proper use of the organisation's copyright 3.4. Make recommendations to appropriate personnel when real or potential infringements of organisation's copyright may require ***further action***
4. Monitor policies and procedures for legitimate use of others' copyright materials	4.1. Research when permission is needed to use copyright material belonging to others 4.2. Advise appropriate personnel about ***restrictions*** on and licensing requirements for the use of others' copyright material, and implement training if required 4.3. Advise appropriate personnel of legislative exceptions that allow use of copyright material without permission 4.4. Monitor policies and procedures covering organisational use of others' copyright material to ensure it is to the benefit of the organisation 4.5. Monitor organisational use of others' copyright material to reduce the risk of infringement 4.6. Take action to minimise damage if infringement of others' copyright material occurs

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- research skills to identify a range of issues and information relating to copyright ownership and use
- organisational skills to review and maintain policies and procedures
- communication skills to provide relevant advice to others about copyright protection
- problem solving skills to monitor copyright policies and procedures and make recommendations for action if required
- technology skills to research copyright information

Required knowledge

- principal features of legislative framework for copyright and its application to the organisation:
  - Australia
    - Copyright Act 1968 and Copyright Regulations 1969
  - internationally
    - WIPO Treaties, in particular the Berne Convention, the WIPO Copyright Treaty and the WIPO Performances and Phonograms Treaty
  - International Trade Agreements, in particular the WTO TRIPS Agreement and the impact of free trade agreements to which Australia is a party (including AUSFTA)
- what works are protected by copyright and how long copyright lasts
- rights of copyright owners
- sources of information and advice on copyright
- methods for preventing unauthorised use of copyright material and action to take if infringement of copyright occurs
- when authorisation for use of copyright materials is needed and how to obtain it
- licensing and the role of collecting societies
- open source copyright licences, such as creative commons, AEShareNet, NEALS, GPL and other similar licences for copyright material
- impact of the internet on copyright

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification of issues for the use, management and protection of original works with copyright • implementation of policies and procedures for the use, management and protection of original works with copyright and legitimate use of others' original material
Context of and specific resources for assessment	Assessment must ensure: • access to relevant information on the individual or organisation's copyright requirements and procedures • access to reliable and appropriate explanatory material and guidelines • access to appropriate computer resources for establishment and maintenance of policies and procedures
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolio of evidence • oral or written questioning to assess knowledge of copyright and its implications for the organisation • development of action plans for implementation of copyright policies and procedures, and commercialisation of original works • analysis of case studies around copyright issues, with recommendations for action
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from BSB07 including other units relating to intellectual property

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Copyright refers to:	• the protection of the original expression of ideas from copying and certain other uses, but not the ideas themselves
	• a large range of works, including:
	  • works of art and design, and graphic representations, e.g. drawings, maps, community art
	  • literature and other written material, e.g. reports, manuals, guides
	  • music, e.g. tunes, lyrics
	  • sound recordings
	  • films and other moving images
	  • drama and dance
	  • broadcasts
	  • computer programs, software, games
	  • online or digital content
	  • traditional knowledge

Legislative requirements may include:	• Copyright Act 1968 • Copyright Regulations 1969
Copyright owner may be:	• creator of the work • employer where the employee creates a work in the course of employment as part of their usual duties, or is contracted to create the work for the employer • person to whom copyright has been assigned • person who arranged for a film or sound recording to be made • person who commissioned design work on a commercial basis • State, Territory or Federal Government for material created under their direction or control

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RANGE STATEMENT	
	• Note: there could be more than one owner of copyright

Rights of the copyright owner may include:	• the exclusive right to reproduce, publish, communicate to the public, publicly perform and adapt material
	• assigning their rights to others so that another party becomes the owner or exclusive licensee of the rights
	• licensing their rights, giving another party the permission to use the copyright material but not own the rights
	• licensing of rights associated with derivative works of copyright material, including:
	  • exact copies
	  • enhancements
	  • supplementary works
	  • compilations
	(For example license to use computer software programs - specialist legal advice should be obtained)
	
	Note: different rights attach to different types of copyright and the term of copyright may also differ

Moral rights:	• refer to the personal legal rights of individual creators in the copyright works they have created. They are separate from the economic rights of the copyright owner and may be held by different people
	• include the right of creators:
	  • to be attributed
	  • not to have their work falsely attributed
	  • not to have their work treated in a derogatory way

Copyright notice may refer to:	• the copyright symbol Â© • name of the copyright owner • year of creation or first publication

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RANGE STATEMENT	
	Note: a copyright notice is not required to obtain copyright protection in Australia, but is recommended to clearly indicate to others that the work is protected and to identify the copyright owner
Sources of information and advice may include:	• IP Australia • Attorney-General's Department • Australian Copyright Council • State and Commonwealth government agencies • lawyers specialising in intellectual property, including trade mark attorneys and patent attorneys • accountants • business advisors • marketing consultants • branding consultants • copyright collecting societies, e.g. CAL, PPCA, MIPI, APRA, AMCOS • publications • websites, Internet • databases, e.g. local and international trade mark databases
Policies and procedures may relate to:	• information technology and computer usage • computer security measures • employment contracts, including responsibility for intellectual property • confidentiality agreements within the organisation or among people who may need to know about the copyright material, so as to keep the copyright secret prior to commercialisation

Direct infringement of copyright may include:	• when a person, without the copyright owner's permission:
	  • reproduces the work (or a substantial portion thereof) in a material form
	  • publishes the work
	  • communicates the work to the public
	  • in the case of literary, dramatic and musical works, performs the work in public

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RANGE STATEMENT	
	• adapts the work
Indirect infringement of copyright may include:	• when a person authorises or facilitates another person to infringe copyright, including through 'inactivity' or 'indifference' • when a person, without the copyright owner's permission, imports certain articles into Australia, e.g. to sell, distribute, exhibit or hire, when the article if made in Australia would have been an infringement of copyright
Implications of copyright infringement may include:	• legal and economic implications of not complying with copyright legislation • legal and economic implications of others infringing the individual or organisation's copyright
Commercialisation potential could include:	• licensing or transferring use of original work • profiting from the sale of the original work • developing a product or creative work under a government grant or other funding source and taking it to a commercial product stage
Copyright collection societies refer to:	• societies that license, collect and distribute royalties on behalf of the copyright owners they represent
Locally refers to:	• copyright protection within Australia which, under the Copyright Act 1968, exists automatically when something is written down or recorded in accordance with the requirements of the copyright legislation
Internationally refers to:	• copyright protection in other countries. Copyright is protected by national laws of each country, usually based on international conventions
Procedures to limit or deter infringement may include:	• making sure there is a copyright notice on all work • statement on works outlining preferred licensing arrangements • access codes in software • encrypting • express agreements on copyright ownership, particularly when work is outsourced
Further action could include:	• seeking legal advice • contacting publisher if the work is published • civil actions, including informal negotiations

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RANGE STATEMENT	

	and letters of cease and desist
	• court order, including:
	  • order to seize infringing goods
	  • injunctions
	• monetary damages/compensation

Restrictions may include:	• not using others' copyright material without authorisation from the copyright owner Note: there are some limited exceptions: • fair dealing for the specific purposes of research or study, criticism or review, and news reporting • reproduction of computer programs, e.g. in the technical processes of running the program, for back-up copy, to correct errors • copying industrial products

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Intellectual Property

Co-requisite units

Co-requisite units		

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BSBIPR402A Protect and use new inventions and innovations

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to protect and use new inventions and innovations as the exclusive intellectual property of an organisation or individual. It covers identifying the need for protection of new inventions or innovations, working with specialists to file a successful patent application, monitoring and protecting intellectual property rights, and using the patent for business growth. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are actively involved in work concerning the development or ownership of inventive and innovative products. They may work as individual inventors or innovators in a range of industries or organisational contexts, as part of a research and development team within an organisation or be commissioning or employing others to develop new inventions or innovations. This unit will give individuals an understanding of patent law and how patents are assigned, to develop an understanding of the actions of patent specialists employed to patent the organisation's new inventions or innovations.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify the need for protection of new inventions and innovations	1.1. Research what constitutes a new ***invention*** or ***innovation*** in Australia 1.2. Identify ***legislative requirements*** governing invention and innovation protection 1.3. Identify inventions and innovations within own organisation that may require protection and identify the ***type of patent*** applicable 1.4. Research ***prior art*** to determine other inventions or innovations in a specific area of technology 1.5. Research ***patent information***, use patent search and

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ELEMENT	PERFORMANCE CRITERIA
	patent search tools, and evaluate their ***usefulness*** for the organisation 1.6. Evaluate ***commercialisation potential*** of new inventions or innovations to determine if protection is worth pursuing
2. Identify and initiate the process for protection of inventions and innovations	2.1. Identify ***sources of information and advice*** regarding protection and searching of new inventions or innovations 2.2. Identify ***processes*** required for filing a successful patent application 2.3. Identify processes for ***international invention protection*** 2.4. Evaluate the role of intellectual property professionals in the patent application process 2.5. Participate in a patent search and patent application and provide relevant information to an intellectual property professional for patent search and patent application, if required 2.6. Identify ***non-registrable*** forms of a protection strategy and evaluate the benefits of utilising patent alternatives
3. Monitor the market and protect and use new inventions and innovations	3.1. Identify and review organisation policies and procedures to ensure the protection and use of new inventions and innovations 3.2. Identify and establish processes to use own and others' patents for business growth 3.3. Identify appropriate ***legal measures*** to protect an invention or innovation against certified infringements, if required, with assistance from appropriate professionals 3.4. ***Monitor*** the market for possible patent infringements 3.5. Ensure all employees are aware of the importance to the organisation of the protection of new inventions and innovations and implement training if required 3.6. Identify and review organisation policies and procedures to prevent infringement of others' inventions and innovations

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• research skills to identify criteria for patent eligibility and to search prior art via patent databases • analytical skills to identify commercial potential of new inventions or innovations • literacy skills to interpret and implement IPAustralia's patent application standards and procedures • problem solving skills to act on potential infringement issues
Required knowledge
• what is considered an invention or innovation • registrable and non-registrable forms of protection • patent application guidelines • overview of relevant legislation concerning patents • sources of information and advice on protection of new inventions or innovations

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification of issues for the use, management and protection of new inventions or innovations • implementation of policies and procedures for the use, management and protection of new inventions or innovations and legitimate use of others' inventions or innovations
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation (application forms, etc.) and resources normally available to a patent applicant

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EVIDENCE GUIDE	
	• access to reliable and appropriate explanatory material and guidelines • access to appropriate computer resources for establishment and maintenance of policies and procedures
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolio of evidence • oral or written questioning to assess knowledge of protection of new inventionsor innovations and its implications for the organisation • development of action plans for implementation of policies and procedures for the protection of new inventions or innovations, and commercialisation of new inventions or innovations • analysis of case studies around patents, with recommendations for action
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from BSB07 including other units relating to intellectual property • design units

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Inventions may include:	• any device, substance, method or process that is: • inventive (i.e. not obvious to someone with knowledge in the field of the

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RANGE STATEMENT	
	invention) • novel (i.e. new) • useful
Innovations may include:	• any device, substance, method or process that involves an 'innovative step', i.e. a change that distinguishes the invention from what is currently known about the technology
Legislative requirements may include:	• the Patents Act 1990; in particular section 18 which stipulates the inventive threshold
Types of patent may include:	• standard patents, which last for twenty years from when the application is filed and cover as many claims as is deemed necessary to protect the invention • innovation patents, which last for eight years from the date of filing and protect up to five claims
Prior art is defined as:	• all information in the public domain relating to previous patents, inventions or innovations that may impact on an invention's or innovation's originality
Patent information refers to:	• the technical and legal information contained in a patent document
Usefulness includes:	• source of technical information • learning about current research and innovations • locating business partners or suppliers • avoiding possible infringement problems • assessing patentability of own invention or innovation • exploitation of out of date patents

Commercialisation potential may include:	• the potential profitability of an innovation which takes into account market size, competitors and investment required to get the invention or innovation to market
	• alternative income stream, such as:
	  • licensing the patent to another party, allowing them to exploit it for a set price or royalties for a set time
	  • profiting from the manufacture and sale of a product
	  • selling or assigning all or part of the rights

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RANGE STATEMENT	
	to the patent • use of other's inventions or innovations within legal frameworks
Sources of information or advice may include:	• IP Australia • Attorney-General's Department • Australian Copyright Council • State and Commonwealth government agencies • lawyers specialising in intellectual property • trade mark attorneys and patent attorneys • accountants • business advisors • marketing consultants • branding consultants • copyright collecting societies, e.g. CAL, PPCA, MIPI, APRA, AMCOS • publications • websites, Internet • databases
Processes may include:	• carrying out searches to ascertain originality of the invention or innovation • reviewing and proliferating confidentiality agreements within organisation or among people who may need to know about the invention/innovation before a patent application is filed so as to keep the invention or innovation secret • establishing a priority date by filing a provisional or complete application before releasing information into the public domain • providing a specification defining the invention or innovation should this precede the previous step • including a Notice of Entitlement form
International invention protection may include:	• filing for protection with the patent offices of overseas countries or regional patent authorities • filing an international application under the Patent Cooperation Treaty (PCT) through IP Australia
Non-registrable may include:	• trade secrets • confidentiality agreements and non-disclosure

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RANGE STATEMENT	
	agreements
Legal measures may include:	• consulting with a patent attorney to explore possible courses of action • pursuing infringements through a civil lawsuit to prohibit future infringements and/or seek monetary compensation for past and/or projected losses • pursuing criminal penalties if warranted by the nature of the infringements
Monitor may include:	• observing the activities of competitors • regularly reviewing patent databases • watching the market for potential patent infringements

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Intellectual Property

Co-requisite units

Co-requisite units		

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BSBIPR403A Protect and use brands and business identity

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to protect and use brands and other business identities as trade marks. It covers identifying the need for trade mark protection, lodging a successful application, monitoring and protecting the trade mark, and using the trade mark commercially. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are involved in work with marketable applications across a variety of work environments.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify the need for protection of brands and business identity	1.1. Research what constitutes a ***registrable trade mark*** in Australia 1.2. Identify the ***legislative requirements*** governing trade mark protection 1.3. Identify ***other forms of trade mark protection*** 1.4. Identify existing or potential trade marks within organisation or scope 1.5. Explore the ***benefits***, costs and risks of trade mark registration and other forms of trade mark protection 1.6. Make recommendations to develop and use trade marks with ***commercialisation potential***
2. Identify and initiate application process for trade mark protection	2.1. Identify ***sources of information and advice*** regarding protection of brands and business identify 2.2. Evaluate the role of intellectual property professionals in the trade mark application process 2.3. ***Search databases*** of existing registered and pending trade marks and ***investigate*** any use of unregistered trade marks to ensure the proposed trade mark does not infringe on another party's existing trade mark 2.4. Identify ***processes*** required for lodging a successful trade mark application 2.5. Identify process for ***international trade mark***

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ELEMENT	PERFORMANCE CRITERIA
	registration 2.6. Participate in a trade mark application and provide relevant information to the intellectual property professional for trade mark application, if applicable
3. Monitor the market and protect and use trade marks	3.1. Identify and review organisation policies and procedures to protect and use the trade mark correctly 3.2. Identify and establish processes to use own and others' trade marks for business growth 3.3. ***Monitor*** the market for possible trade mark infringements 3.4. Pursue appropriate ***measures*** to protect trade marks against infringements, if required, using appropriate professional advice 3.5. Ensure that procedures are followed to maintain the organisation's trade marks, including ***payment of renewal fees*** as required 3.6. Ensure all employees are aware of the importance to the organisation of the protection and ***proper use of trade marks***, and implement training if required 3.7. Identify and review organisation policies and procedures to prevent infringement of others' trade marks

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• research skills to identify relevant areas of trade mark law and the common law to protect organisation's intellectual property • analytical skills to identify commercial potential of trade marks and brands • literacy skills tointerpret and implement IP Australia's trade mark application procedures • problem solving skills to act on potential infringement issues
Required knowledge
• different ways to protect trade marks • application guidelines, including definitions of registrable trade marks

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REQUIRED SKILLS AND KNOWLEDGE
• application formats and procedures • overview of relevant legislation concerning trade marks • sources of adviceon trade mark protection

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification of issues for the use, management and protection of brands and business identity • implementation of policies and procedures for the use, management and protection of brands and business identity and legitimate use of others' trade marks
Context of and specific resources for assessment	Assessment must ensure: • access to relevant information on the individual or organisation's brands and business identity requirements and procedures • access to reliable and appropriate explanatory material and guidelines • access to appropriate computer resources for establishment and maintenance of policies and procedures
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolio of evidence • oral or written questioning to assess knowledge of protection of brands and business identity and its implications for the organisation • development of action plans for implementation of policies and procedures for protections of brands and

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EVIDENCE GUIDE	
	business identity, and commercialisation of trade marks • analysis of case studies around trade mark issues, with recommendations for action
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from BSB07 including other units relating to intellectual property • design units

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Registrable trade marks may include:	• letters, words, names, signatures, phrases, numerals, sounds, smells, shapes, logos, pictures, aspects of packaging, or any combination of these that can be represented graphically A trade mark can be difficult to register if it is: • a generic word • a term that other traders may need to use in relation to the same kinds of goods or services • identical with or deceptively similar to a pending or registered trade mark • likely to mislead the public about the nature of the goods or services • scandalous or against the law Note: registration of a business, company or domain name does not in itself give proprietary rights

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RANGE STATEMENT	
Legislative requirements may include:	• the Trade Marks Act 1995 • Section 52 of the Trade Practices Act 1974
Other forms of trade mark protection include:	• common law by the passing off action • consumer protection provisions of Trade Practices Act (Commonwealth) and State fair trading acts • reviewing and proliferating confidentiality agreements within organisation or among people who may need to know about the trade mark before application for registration is lodged so as to keep the trade mark secret
Benefits include:	• trader protection, e.g. protecting reputation of traders, facilitating advertising, encouraging brand loyalty, building brand value, persuading consumers to try new products under the established brand • consumer protection, e.g. to facilitate choice between competing goods and services
Commercialisation potential may include:	• considering the trade mark as an asset that can be bought, sold or licensed • utilisation of the trade mark as a marketing tool and the basis for building a brand
Sources of information and advice may include:	• IP Australia • Attorney-General's Department • Australian Copyright Council • State and Commonwealth government agencies • lawyers specialising in intellectual property • trade mark attorneys and patent attorneys • accountants • business advisors • marketing consultants • branding consultants • copyright collecting societies, e.g. CAL, PPCA, MIPI, APRA, AMCOS • publications • websites, Internet • databases e.g. local and international trade mark databases
Searching databases may include using the following:	• IP Australia's trade marks database which lists all the registered and pending trade marks • the Australian Securities and Investment Commission database, which lists all registered and reserved business names (www.asic.gov.au)

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RANGE STATEMENT	
	• any other information source that is relevant to the goods or services provided by the applicant, e.g. trade directories, Yellow Pages
Investigating may involve:	• using search engines on the Internet • reviewing relevant industry journals, articles, advertising, etc. Note: The purpose is to determine whether competitors have used the proposed trade mark, or a similar mark, and developed a reputation in the mark
Processes include:	• completing an approved form prescribed by the regulations, including graphically representing the trade mark on the application • paying a specified fee • having the application approved by a trade marks examiner
International trade mark registration includes:	• filing for protection with the trade mark offices of overseas countries • filing for protection under the Madrid Protocol through IP Australia to seek trade mark registration in a range of countries with a single application
Monitoring may include:	• observing the activities of competitors • watching the market for potential trade mark infringements

Measures may include:	• bringing actions against an alleged infringer under:
	  • the Trade Marks Act 1995
	  • Section 52 of the Trade Practices Act 1974
	  • the common law tort of passing off
	• bringing an opposition against, or seeking removal of, other trade marks which may infringe

Payment of renewal fees may refer to:	• ensuring that the required fees are paid to periodically renew the trade mark registration • licence fees to ensure the use of another organisation's trade mark
Proper use of trade mark includes:	• ensuring that the trade mark is used 'as a trade mark', otherwise it may become vulnerable for removal • using the mark with the correct notation (e.g.TM or (R))

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Intellectual Property

Co-requisite units

Co-requisite units		

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BSBIPR404A Protect and use innovative designs

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to protect the appearance or look of manufactured or hand made articles as registered designs. It covers identifying the need for protection, the process of design registration, monitoring and protecting registered designs, and using registered designs commercially. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals and organisations who are involved in creating industrial or fashion designs across a variety of work environments.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify the need for protection of innovative designs	1.1. Research what constitutes ***a registrable design*** and what ***exclusive rights*** are obtained through registration 1.2. Identify ***legislative requirements*** governing design registration 1.3. Research ***prior art*** to determine what has already been published or registered in the area of design 1.4. Assess whether copyright provides protection and determine adequacy of ***non-registrable protection*** 1.5. Identify innovative designs within own organisation with commercial potential 1.6. Evaluate and make recommendations for ***commercialisation potential*** of innovative designs
2. Identify and initiate application for protection of innovative designs	2.1. Identify ***sources of information and advice*** regarding protection of innovative designs 2.2. Evaluate the role of intellectual property professionals in the registration process 2.3. Identify ***processes*** required for the application for registration of a design 2.4. Identify process for ***international design registration*** 2.5. Participate in a design registration process and, if applicable, provide relevant information to an

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ELEMENT	PERFORMANCE CRITERIA
	intellectual property professional
3. Monitor the market and protect and use registered design	3.1. Identify and review organisation policies and procedures to protect and use the organisation's designs correctly 3.2. Identify and establish processes to use own and others' registered designs for business growth 3.3. Ensure that procedures are followed for the organisation to ***maintain*** innovative design protection 3.4. Ensure all employees are aware of the importance to the organisation of the protection of designs, and implement training, if required 3.5. ***Monitor*** the market for possible infringements of registered designs 3.6. Pursue appropriate ***legal measures*** to protect designs against infringements, if required, using appropriate professional advice 3.7. Identify and review organisation policies and procedures to ensure all employees respect the work of other designers in fair and open competition

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- research skills to identify rules governing design registration and search databases
- analytical skills to identify commercial potential of innovative designs and their registration applicability
- literacy skills tointerpret IP Australia's design registration procedures and contribute to an innovative design protection application
- problem solving skills to act on potential infringement issues

Required knowledge

- application guidelines, formats and procedures to protect innovative designs
- overview of relevant legislation concerning designs, including the overlap of intellectual property rights between design protection and copyright
- sources of information and advice about protection of designs

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification of issues for the use, management and protection of innovative designs • implementation of policies and procedures for the use, management and protection of innovative designs and legitimate use of others' designs
Context of and specific resources for assessment	Assessment must ensure: • access to relevant information on the individual or organisation's innovative design protection requirements and procedures • access to reliable and appropriate explanatory material and guidelines • access to appropriate computer resources for establishment and maintenance of policies and procedures
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolio of evidence • oral or written questioning to assess knowledge of protection of innovative designs and its implications for the organisation • development of action plans for implementation of policies and procedures for the protection of innovative designs, and commercialisation of innovative designs • analysis of case studies ofissues about protection of innovative designs, with recommendations for action
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended,

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EVIDENCE GUIDE	
	for example: • other units from BSB07 including other units relating to intellectual property

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Registrable design refers to:	• the appearance or look of a manufactured or hand made article that is:
	  • new and distinctive
	  • not substantially similar in overall impression to designs in the prior art
	  • distinctive in the view of the Informed User
	  • not used or shown in public before first application
	• design protection may not be appropriate to protect:
	  • how a product works or functions
	  • items that are primarily artistic or literary in nature

Exclusive rights are defined as:	• the right to prevent others from making, using and exploiting a design for a product, in relation to which the design is registered, for a specified period of time
	• exclusive rights are limited in the following ways:
	  • infringement may not occur if the design is used on a product outside of the scope to that for which the design was registered
	  • certain repairs may not infringe the design where the product is a component part of a complex product

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RANGE STATEMENT	
	• protection does not cover the design features if only the idea of the general functional features are copied, as a product's function cannot be protected under design • protection does not cover the underlying idea of the design, only the actual design
Legislative requirements refer to:	• Designs Act 2003 • Design Regulations • Copyright Act 1968
Prior art is defined as:	• all information in the public domain relating to previous designs that may impact on the design's originality
Non-registrable protection may include:	• trade secrets • confidentiality agreements and non-disclosure agreements
Commercialisation potential may include:	• licensing the design to third parties for a fee or under certain conditions • profiting from the manufacture and sale of a registered design
Sources of information and advice include:	• IP Australia • Attorney-General's Department • Australian Copyright Council • State and Commonwealth government agencies • lawyers specialising in intellectual property • trade mark attorneys and patent attorneys • accountants • business advisors • marketing consultants • branding consultants • copyright collecting societies, eg CAL, PPCA, MIPI, APRA, AMCOS • publications • websites, Internet • design databases
Processes may include:	• reviewing and proliferating confidentiality agreements within organisation or among people who may need to know about the design before application for registration is lodged so as to keep the design secret

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RANGE STATEMENT	

	• carrying out searches on relevant databases including:
	  • bibliographic and pictorial searches on IP Australia's website
	  • pictorial or representation searches in the public domain
	  • drafting a completed application form
	  • preparing copies of representations of the design in relation to a product
	• the application process may also include, if desired or requested:
	  • requesting an examination
	  • considering the value of a Statement of Newness and Distinctiveness to identify particular visual features of the design as new and distinctive
	  • responding to any adverse findings the Registrar of Designs may identify during the examination process
	  • considering any material submitted by a third party to dispute the Newness and Distinctiveness of the design

International design registration may include:	• filing for design registration with the relevant offices of a foreign country Signatory states to the international convention for design protection allow for the priority date assigned to the design in Australia to be obtained internationally if applied for within six months of lodgement in Australia
Maintain protection may include:	• keeping track of registration expiration dates • applying for renewal of registration
Monitoring may include:	• observing the activities of competitors • scanning the market for potential design infringements • regular or ad-hoc searching of design applications and/or registrations locally or internationally
Legal measures may include:	• seeking legal advice from an appropriate professional • requesting examination of suspected infringements

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RANGE STATEMENT	
	• bringing infringement proceedings against a party • suing a party who has imported any infringing designs into Australia • suing a party who has sold, or offered for sale, any product infringing their rights in the design • implementing other business, regulatory or market strategies within legal means

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Intellectual Property

Co-requisite units

Co-requisite units		

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BSBIPR405A Protect and use intangible assets in small business

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively protect and exploit the intellectual property of a small business. It focuses on identifying and valuing intangible assets, implementing measures to protect and commercialise these assets as well avoiding the infringement of others' intellectual property rights. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who either operate a small business or who are investigating the establishment of a small business. It particularly applies to small businesses that have intangible assets with market value which require protection, and which can be used to improve business performance. Intangible assets refer to assets which may be protected under a range of intellectual property legislation, including patents, trade marks, designs and copyright, as well as protection under other techniques, such as common or contract law. This unit encourages small business owners to seek expert advice from intellectual property professionals when required for the protection of intellectual property.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify and value intangible assets which are key to the small business	1.1. Identify ***intangible assets***, which are a key to the ongoing success of the small business, through an ***intellectual property audit*** 1.2. Research appropriate ***sources of information and advice*** for protecting and effectively exploiting the small business's intangible assets, and seek professional advice when required 1.3. ***Value*** intangible assets so they can be incorporated into the ***business plan*** and risk assessment strategy
2. Identify and select	2.1. Identify the ***types of protection*** for intangible assets,

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ELEMENT	PERFORMANCE CRITERIA
types of protection available for intangible assets	including ***registered*** and ***unregistered*** protection 2.2. Identify relevant ***legislative requirements*** in relation to the proper use and protection of intangible assets 2.3. Calculate the likely costs, risks and benefits of potential types of protection available 2.4. Assess organisational requirements, and balance costs and benefits to select the most appropriate methods to protect and use intangible assets
3. Implement appropriate protection for intangible assets	3.1. Ensure all employees, partners and directors are aware of the importance to the small business of protection of intangible assets 3.2. Implement ***confidentiality agreements*** if appropriate with employees and others who might have access to commercially sensitive information 3.3. Search ***appropriate databases*** and other resources to determine whether the small business's intangible assets are original, to avoid infringement of the intangible assets of others 3.4. Follow procedures to protect intangible assets according to the type of protection required, using appropriate intellectual property professionals 3.5. Develop and implement processes for detecting and defending infringements against the small business's intangible assets 3.6. Monitor the market for possible infringements of protection of intangible assets and take appropriate action if required
4. Develop and implement processes to avoid infringement of the rights of others	4.1. Develop and implement processes so that the small business does not infringe ***others' intellectual property rights*** 4.2. Ensure all employees are aware of and understand the importance of avoiding the infringement of others' intellectual property rights
5. Use and commercialise the small business's and others' intangible assets	5.1. Identify options for exploiting and ***commercialising*** own intangible assets 5.2. Identify intellectual property of others that can legally be used by the small business for business advantage 5.3. Identify taxation, accounting and financial reporting requirements for any ***gains*** made from commercialisation of intangible assets

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• research and analytical skills to investigate and interpret relevant legal requirements in relation to protection of intangible assets • numeracy skills to understand the value of intangible assets • organisational skills to develop processes to protect, use and exploit intangible assets • communication skills to provide information to relevant personnel about intellectual property
Required knowledge
• basic knowledge of types of intellectual property and the key characteristics of each • the range of intellectual property residing with the organisation • basic knowledge of relevant legislative requirements as they apply to the job role

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification of issues for the use, management and protection of intangible assets • implementation of policies and procedures for the use, management and protection of intangible assets and legitimate use of others' intangible assets in a small business context
Context of and specific resources for assessment	Assessment must ensure: • access to a small business, either own, other or proposed, for exploration of intangible assets

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EVIDENCE GUIDE	
	• access to relevant documentation, including explanatory materials and guidelines • access to appropriate computer resources for establishment and maintenance of policies and procedures
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolio of evidence • oral or written questioning to assess knowledge of intellectual property and its implications for the organisation • development of action plans for implementation of intellectual property policies and procedures, and commercialisation of intangible assets • analysis of case studies around intellectual property issues, with recommendations for action • presentation to financial backers or others showing how intangible assets will be protected and commercialised
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB401A Establish legal and risk management requirements of small business • BSBSMB403A Market the small business

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Intangible assets may include:	• brand • business name

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RANGE STATEMENT	
	• customer/client list • computer systems software • confidential information • copyrights • core technology • database • design • distribution agreements • domain name • employees' specialist knowledge • goodwill • ideas • innovation • invention • logo • packaging • patent • practical application of a good idea • process • product • promotional materials • secret recipe, process, formula • standard of service/unique service technique • trade mark • trade secret • training manuals

Intellectual property audit refers to:	• a systematic review of the intellectual property owned, used or acquired by a person or organisation. It includes:
	  • identifying products or services that are key to the small business
	  • identifying intangible assets and the legal rights in relation to protection of the assets
	  • understanding what market advantage these rights give the small business

Sources of information and advice may include:	• IP Australia • Attorney-General's Department • Australian Copyright Council • State and Commonwealth government agencies

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RANGE STATEMENT	
	• lawyers specialising in intellectual property • trade mark attorneys and patent attorneys • accountants • business advisors • marketing consultants • branding consultants • copyright collecting societies, e.g. CAL, PPCA, MIPI, APRA, AMCOS • publications • websites, Internet • databases e.g. local and international trade mark databases

Value may include:	• using processes in accordance with accepted accounting standards and with the assistance of appropriate professionals:
	  • calculating how much time would be required to develop these assets from scratch
	  • estimating how much a competitor might pay to buy or use these assets
	  • estimating how much of the organisation's profit is attributable to the assets

Business plan may include:	• executive summary • objectives • description of the business • legal requirements, including intangible assets • selling and marketing strategy • research and development plan • production or operating strategies • ownership and management plan • funding strategy • financial plan • strengths, weaknesses, opportunities and threats, including intangible assets
Types of protection may include:	• copyright • registered patents • registered and unregistered trade marks • registered company name, business name, domain name • registered designs • trade secrets

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RANGE STATEMENT	
	• sui generis protection (e.g. plant breeders and circuit layouts) • moral rights
Registered protection refers to:	• protection which occurs through the registration of the particular intangible assets, e.g. trade marks, patents and designs
Unregistered protection refers to:	• protection which occurs automatically by law, without the need for registration, e.g., copyright, moral rights and common law trade marks
Legislative requirements may include:	• Business Names legislation • Copyright Act 1968 • Designs Act 2003 • Patents Act 1990 • Trade Marks Act 1995 • Trade Practices Act 1974 and State/Territory fair trading legislation
Confidentiality agreements may refer to:	• an agreement between a party with confidential information and a party to whom that confidential information will be disclosed (e.g. potential partners and financial backers, employees) outlining conditions of the disclosure and permitted use of the information
Appropriate databases may include:	• public registers of registered Australian and international patents, trade marks, designs and plant breeders' rights • Note: these may be accessed via IP Australia's website or through use of a commercial search company or patent and trade mark attorney
Others' intellectual property rights may be infringed through unlicensed use of:	• brands, logos, packaging, colours • domain names, business and company names • inventions, innovations, business methods • designs • content, e.g. photos, text, images • software • music • film • technology in new invention
Commercialising intangible assets	• franchising • licensing

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RANGE STATEMENT	
may include:	• selling off business and/or processes, inventions, brands, etc. • manufacturing

Gains may include:	• proceeds from:
	  • sales
	  • franchising
	  • licensing
	  • use of the intellectual property or associated products

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Intellectual Property

Co-requisite units

Co-requisite units		

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BSBIPR501A Manage intellectual property to protect and grow business

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to protect, secure and effectively use intangible assets of value to an organisation. It focuses on establishing and maintaining systems to protect and exploit an organisation's intellectual property to ensure business growth. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to managers or coordinators who take an active role in recognising, securing and commercialising intangible assets which contribute to the organisation's profitability, productivity, product or service delivery, and market leadership. These managers and coordinators may work in a range of industry or other contexts and may have responsibility for managing people, systems or processes.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify the organisation's intellectual property assets and rights	1.1. Identify the ***intangible assets*** residing within the organisation and how they can be protected 1.2. Identify the ***sections of the organisation*** in which ***intellectual property*** is created, procured or transferred and for which management is required 1.3. Research ***intellectual property rights*** appropriate to the organisation according to ***legislative requirements*** 1.4. Identify and access ***sources of information and advice*** for protection of the organisation's intellectual property 1.5. Conduct a cost-benefit analysis of protecting intellectual property and determine risks 1.6. Identify and use appropriate intellectual property

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ELEMENT	PERFORMANCE CRITERIA
	professionals to initiate processes to protect intellectual property, according to the type of intellectual property protection required
2. Create a strategy to manage the organisation's intellectual property	2.1. Review or create an organisational strategy, and review or develop policies and procedures for protection, management and use of intellectual property as part of the organisation's business strategy 2.2. Plan and implement an ***intellectual property audit*** and establish or review the value and use of the organisation's ***intangible assets*** inventory 2.3. Plan and make recommendations for implementation of a strategy for business growth through use of organisation's intellectual property 2.4. Plan and implement ***strategies*** to ensure employees, partners and contractors protect the organisation's and others' intangible assets 2.5. Establish or review procedures to securely record and store ***documentation*** related to the organisation's intangible assets
3. Monitor and maintain organisational strategies for the protection and use of intellectual property	3.1. Monitor and review strategies, policies and procedures for the identification, protection and use of intellectual property regularly to ensure they are working effectively, and make changes if required 3.2. Manage the identification of potential ***infringement*** of organisation's intellectual property rights, and ensure appropriate action is taken 3.3. Promote a culture of ***compliance*** and respect for other organisations' and individuals' intellectual property rights
4. Manage the commercialisation of the organisation's intellectual property to ensure business growth	4.1. Research the role intellectual property will play in the strategic plans of the organisation 4.2. Contribute to the implementation of the ***commercialisation*** of the organisation's intellectual property 4.3. Manage the review of the activities of existing or potential competitors and assess their impact on the organisation's intangible assets 4.4. Access and effectively use others' intellectual property within legal guidelines for business advantage

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication and analytical skills to conduct audits and make recommendations for compliance and commercialisation of intellectual property • interpersonal skills to foster a positive culture of compliance within the organisation • marketing skills to contribute to the commercialisation of the organisation's intellectual property • problem solving skills to address intellectual property compliance issues • research skills to find and interpret relevant legislation in relation to the particular types of intellectual property
Required knowledge
• types of intellectual property protection and time restraints on protection • relevant legislation and regulations relating to intellectual property rights • potential sources of information and advice about intellectual property • business and marketing advantages of intellectual property protection • strategic and business planning • options for commercialisation

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification of the types of intellectual property within the organisation and the relevant legislation protecting them • establishment or review of strategies, policies and procedures for the management and use of own and others' intellectual property • identification of commercialisation potential of an

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EVIDENCE GUIDE	
	organisation's intellectual property
Context of and specific resources for assessment	Assessment must ensure: • access to relevant organisational strategies, policies and procedures; or access to information to allow for the design of these policies and procedures • access to relevant legislation and regulations as they relate to intellectual property • access to appropriate computer resources for online search and report preparation
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of data collected on intangible assets and their compliance requirements within an organisation • direct questioning combined with review of portfolio of evidence and third party workplace reports of on-the-job performance by the candidate, to demonstrate the establishment of strategies, policies and procedures to manage an organisation's intellectual property • third party reports to demonstrate how the candidate promoted a culture of respect for the intellectual property of others • presentation to appropriate personnel on the commercialisation of a range of intellectual property within the organisation • oral or written questioning about relevant legislation as it relates to the organisation's intellectual property
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBRSK501A Manage risk • other management units from BSB07

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different

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RANGE STATEMENT	
work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Intangible assets may include:	• brand • business name • customer/client list • computer systems software • confidential information • copyrights • core technology • database/customer list • design • distribution agreements • domain name • employees' specialist knowledge • goodwill • ideas • innovation • invention • logo • packaging • patent • practical application of a good idea • process • product • promotional materials • secret recipe, process, formula • standard of service/unique service technique • trade mark • trade secret • training manuals

Sections of the organisation may include:	• any section of the organisation that creates products or services that may be protected by intellectual property rights, or that is responsible for the management of intellectual property, including:
	  • design department
	  • marketing department

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RANGE STATEMENT	
	• research and development department • product development group • human resource department • production, administration or service delivery • legal services unit
Intellectual property refers to:	• the output of the mind or intellect rather than tangible objects. It includes: • copyright • trade marks • patents • designs • plant breeder's rights • circuit layout rights • confidential information/trade secrets
Intellectual property rights may refer to:	• the exclusive rights associated with the relevant intangible asset • the right to prevent use by others of the intangible asset
Legislative requirements may include:	• Business Names legislation • Copyright Act 1968 • Designs Act 2003 • Patents Act 1990 • Trade Marks Act 1995 • Trade Practices Act 1974 and State/Territory fair trading legislation
Sources of information and advice may include:	• IP Australia • Attorney-General's Department • Australian Copyright Council • State and Commonwealth government agencies • lawyers specialising in intellectual property • trade mark attorneys and patent attorneys • accountants • business advisors • marketing consultants • branding consultants • copyright collecting societies, e.g. CAL, PPCA, MIPI, APRA, AMCOS • publications

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RANGE STATEMENT	
	• websites, Internet • databases, e.g. local and international trade mark databases

Intellectual property audit may involve:	• a systematic review of the intellectual property owned, used or acquired by a person or organisation, including:
	  • products or services that are key to the organisation
	  • intangible assets and the legal rights that constitute them in relation to the goods or services
	  • what market advantage these rights give the organisation
	  • rights under which the organisation uses intellectual property
	  • gaps or weaknesses in the organisation's intellectual property and rights
	• the valuation and recording of such intangible assets in accordance with accepted accounting standards

Intangible assets refer to:	• registered forms of intellectual property, such as patents and trade marks • unregistrable forms of intellectual property, such as copyright, client lists, know how, staff and training programs

Strategies may include:	• preparation of employer, contractor and supplier contracts which protect the organisation's intellectual property, so that:
	  • the organisation's intellectual property is not introduced into other organisations
	  • ownership of the intellectual property is established, e.g. external contractors designing training materials for an organisation
	• licensing, assignment or transfer of the organisation's intellectual property to other parties for the benefit of the organisation or its stakeholders
	• conducting appropriate clearance searches and investigations

Documentation may include:	• deeds • registration certificates

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RANGE STATEMENT	
	• licence agreements • contract and end user licence agreements • employment contracts
Infringement occurs when:	• someone consciously or inadvertently uses another party's intellectual property without their permission

Compliance is important to:	• identify and where necessary take action to prevent breaches of laws and regulations in relation to intellectual property, to:
	  • avoid costly legal decisions
	  • be a good corporate citizen

Commercialisation may include:	• utilising intellectual property with the aim of producing financial or other commercial gain, and/or public benefit, including:
	  • adapting
	  • applying
	  • assigning
	  • copying
	  • developing
	  • licensing
	  • making
	  • publishing
	  • selling
	  • using

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Intellectual Property

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Co-requisite units

Co-requisite units		

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BSBIPR601A Develop and implement strategies for intellectual property management

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to obtain a strategic advantage from developing and implementing strategies for the management of intellectual property. It covers the evaluation of approaches to the management of intellectual property, and focuses on establishing, implementing, evaluating and monitoring an organisation's intellectual property strategy. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to directors or managers who take an active role in recognising and securing intangible assets which contribute to the organisation's profitability, productivity and market leadership. These managers and coordinators may work in a range of contexts and may have responsibility for managing people, systems or processes.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Evaluate approaches to the management of intellectual property	1.1. Analyse strategic and operational plans to determine ***intellectual property*** requirements 1.2. Identify ***sources of information and advice*** regarding approaches to the best practice management of intellectual property 1.3. Determine the implications and potential ***strategic advantage*** from ***protection*** of intellectual property 1.4. Determine the implications and potential strategic advantage from adopting a ***collaborative approach*** to intellectual property 1.5. Determine the implications and potential strategic advantage from adopting an ***open source*** approach to intellectual property
2. Establish a strategy	2.1. Develop an ***intellectual property strategy*** for

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ELEMENT	PERFORMANCE CRITERIA
for managing intellectual property	management and use of own and others' intellectual property in line with the organisation's strategic goals or plans 2.2. Examine requirements and options for ***commercialisation*** or effective use of intellectual property 2.3. Establish required ***documentation*** for the management of the intellectual property strategy 2.4. Develop ***strategies for addressing intellectual property infringement*** 2.5. Ensure intellectual property strategy complies with legislative requirements and organisational policies 2.6. Communicate intellectual property strategy to key stakeholders within the organisation and externally
3. Evaluate proposed intellectual property strategy	3.1. Obtain legal and other professional advice regarding the proposed intellectual property management strategy 3.2. Identify and evaluate the benefits from the proposed intellectual property management strategy 3.3. Identify and evaluate the disadvantages, costs and risks of the proposed intellectual property management strategy 3.4. Adjust strategy according to legal advice and evaluation 3.5. Establish, document and present the ***business case*** for adopting the proposed intellectual property management strategy to senior management, directors and other key stakeholders
4. Implement and monitor the intellectual property management strategy	4.1. Work with others to ensure the ***implementation*** of the strategy 4.2. ***Monitor*** and evaluate the strategy and its implementation and report to senior management, directors and other key stakeholders 4.3. Make changes to strategy and its implementation as required

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to question, clarify and report on proposed strategy and develop any required documentation, such as licence agreements • financial and analytical skills to prepare a business case for the proposed strategy • information technology and research skills to find and interpret relevant information about intellectual property • conceptual skills to design an organisational strategy • demonstration of characteristics of responsible business practice and ethical behaviour
Required knowledge
• types of intellectual property as they relate to the organisation • alternative strategies for the organisation's intellectual property • relevant legislation and regulations relating to the organisation's intellectual property rights • potential sources of information and advice about intellectual property

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification of intellectual property rights appropriate to the types of intellectual property within the organisation and the relevant legislation • establishment of strategies for the management of intellectual property • feasibility study outlining alternative strategies, with risk analysis and cost-benefit analysis of each alternative • recommendations for and implementation of commercialisation of intellectual property

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to relevant legislation and regulations as they relate to intellectual property • access to appropriate computer resources for online search and report preparation • access to sources of information and advice
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of intellectual property strategy alternatives • direct questioning combined with review of portfolio of evidence and third party workplace reports of on-the-job performance by the candidate, to demonstrate the establishment of strategies to manage an organisation's intellectual property • presentation to appropriate personnel on the commercialisation of a range of intellectual property within the organisation, or the chosen intellectual property strategy • oral or written questioning about relevant legislation as it relates to the organisation's intellectual property strategy
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other management units from BSB07

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Intellectual property refers to:	• the output of the mind or intellect rather than tangible objects, including:

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RANGE STATEMENT	
	• copyright • trade marks • patents • designs • plant breeder's rights • circuit layout rights • confidential information/trade secrets
Sources of information and advice may include:	• IP Australia • Attorney-General's Department • Australian Copyright Council • State and Commonwealth government agencies • lawyers specialising in intellectual property • trade mark attorneys and patent attorneys • St James Ethics Centre • accountants • business advisors • marketing consultants • branding consultants • copyright collecting societies, eg CAL, PPCA, MIPI, APRA, AMCOS • publications • websites, Internet • databases, e.g. local and international trade mark databases
Strategic advantage may refer to:	• the relative standing against competitors in the global market place • the strategic benefit of the organisation's clients or stakeholders
Protection may include:	• protection through a range of legislation, including: • Copyright Act 1968 • Designs Act 2003 • Patents Act 1990 • Trade Marks Act 1995 • Trade Practices Act 1975 and State/Territory free trading legislation • business names legislation
Collaborative approach may	• specific partners • the industry, both nationally and

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RANGE STATEMENT	
include working with:	internationally
Open source refers to:	• the creative practice of appropriation and free sharing of found and created content

Intellectual property strategy may include:	• an approach of:
	  • protection
	  • collaboration
	  • open source
	  • mix of the above
	• developing a global intellectual property strategy
	• links to:
	  • risk management strategy
	  • business and marketing plans
	  • organisational training needs

Commercialisation may include:	• utilising intellectual property with the aim of producing financial or other commercial gain, and/or public benefit, including:
	  • adapting
	  • applying
	  • assigning
	  • copying
	  • developing
	  • licensing
	  • making
	  • publishing
	  • selling
	  • using

Documentation may include:	• documented portfolio of intangible assets • intellectual property agreements or licences register • policies and procedures
Strategies for addressing intellectual property infringement may involve:	• identifying threats to the organisation from intellectual property infringement • determining the cost of litigation or other actions against intellectual property infringement • determining the impact of intellectual property infringement • establishing a business case for the intellectual

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RANGE STATEMENT	
	property infringement strategy • licensing intellectual property on negotiated terms
Infringement occurs when:	• someone consciously or inadvertently uses another party's intellectual property without their permission
Business case consists of:	• a feasibility study with a cost-benefit analysis

Implementation may include:	• overseeing the:
	  • development of policies and procedures around the strategy
	  • development of a communication strategy for internal and external stakeholders
	  • development of information sessions and training around relevant aspects of intellectual property
	  • development of required documentation, e.g. licence agreements
	  • negotiation of use of own and/or others' intellectual property

Monitoring may include:	• consulting key stakeholders to provide feedback on the strategy • reviewing documentation in relation to the strategy, eg licence agreements or sharing arrangements • analysing profit from commercialisation of intangible assets • reviewing any potential or real infringements of intellectual property which could have an impact on the organisation • reporting of implementation of the strategy and its variation to the intended strategy • applying corrective action where required

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Regulation, Licensing and Risk - Intellectual Property

Co-requisite units

Co-requisite units		

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BSBITA401A Design databases

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to design and develop a database (including queries, forms and reports) to meet a defined need using existing data. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who create databases to store and retrieve data using commercially available database software. They may provide administrative support within an enterprise, or may be independently responsible for designing databases relevant to their own work roles.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Design database	1.1. Review ***organisational and task requirements*** to confirm ***scope and functionality of database*** design, including data redundancy 1.2. Develop a logical data model to identify and classify data into types 1.3. Select appropriate ***software*** according to organisational and task requirements and required scope and functionality of database 1.4. Confirm database design with ***appropriate person***
2. Develop database	2.1. Set field attributes according to data type and link databases by a common field in accordance with software procedures 2.2. Identify primary key to uniquely identify data 2.3. Identify foreign keys to establish associations between data 2.4. Use ***software functions*** and ***formulae*** to meet organisational and task requirements 2.5. Create password and access system according to organisational and task requirements
3. Develop queries, forms and reports	3.1. Develop queries as required by organisational and task requirements 3.2. Develop input screens or forms in order to access required data

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ELEMENT	PERFORMANCE CRITERIA
	3.3. Develop reports according to organisational and task requirements
4. Test and finalise database	4.1. Populate database with sample dataset for testing 4.2. Assess and document effectiveness of data relationships, queries forms and reports 4.3. Address any errors in database design 4.4. ***Name and store*** database in accordance with organisational requirements and exit the application without data loss or damage 4.5. Confirm database readiness with appropriate person

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to interpret and evaluate the purposes and features of databases
- numeracy skills to utilise software functions and formulae, and to establish data relationships and queries
- planning and organising skills to establish database design
- problem-solving skills to address inconsistencies in database design and data relationships.

Required knowledge

- advanced functions of database software applications
- impact of formatting and design on the presentation and readability of data
- key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • producing a database containing a minimum of three tables and incorporating queries, reports and forms • knowledge of advanced functions of database software app.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to sample data.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of databasedesign • review of database testing • demonstration of techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • IT use units • other IT analysis and design units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work

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RANGE STATEMENT	
situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Organisational and task requirements may include:	• business requirements • consistent corporate image, including colour schemes and company logo • established guidelines and procedures for data usage • existing database templates • final output requirements for data • house styles • observing copyright legislation • organisation name, time, date, document title, filename or other fields in headers and footers • technical operating environment and platform
Scope and functionality of database may include:	• concurrency of access requirements • data relationships • data structures • forms • queries • reports • screens • security features • table relationships
Software may include:	• commercial software applications • organisational specific software
Appropriate person may include:	• clients • colleagues • supervisors
Software functions may include:	• adding, deleting, moving, re-labelling fields • altering field widths • calculations, formula • data protection • field definitions and attributes • formatting fields • formatting text • headers and footers • inserting and deleting blank lines and spaces • macros • append

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RANGE STATEMENT	
	• delete • edit • exit • list • print • query • report • repeating (if available) • table, form and report wizards
Formulae may include:	• formulae • addition • average • combinations of formulae • count • division • maximum • minimum • multiplication • subtraction • sum
Naming and storage may include:	• authorised access • filing locations • organisational policy for backing up files • organisational policy for filing hard copies of spreadsheets • security • storage in folders and sub-folders • storage on disc drives, CD-ROM, USBs, tape or server back-up

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Information and Communications Technology - IT Analysis and Design

Co-requisite units

Co-requisite units		

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BSBITA601A Configure and optimise customer contact technology

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to establish optimal functionality and efficiency from technologies by configuring them to best suit operational needs.

Application of the Unit

This unit is applied in a customer contact environment where complex technology is employed and where the configuring of this technology is undertaken on an ongoing basis to maximise efficiencies and benefits to the organisation.

Competence in this unit requires comprehensive knowledge of customer contact technology, an appreciation of alternative and emerging trends and options in technology, and highly developed analytical skills to maximise the effectiveness and efficiency of the technology. Well developed understanding of business objectives and goals and cost benefit analysis are also required.

This role may be undertaken by those with managerial responsibility or specialist staff, depending on the size and structure of the centre.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

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Pre-Requisites

Not applicable

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Analyse current capability of customer contact technology	1.1. Clearly specify the role of ***customer contact technology*** in customer contact operations 1.2. Recognise the scope of the functions supplied by the technology 1.3. Accurately align the capabilities of the technology to current and potential operational needs
2. Benchmark competing new technology applications	2.1. Identify specific operational needs that can be met by technology 2.2. Identify range of functions and capabilities supplied by ***benchmarking competing technologies*** 2.3. Select critical features of competing technologies for analysis 2.4. Conduct an analysis of technologies using cost effective processes 2.5. Select or report on appropriate new technology by considering the analysis of ***critical features***
3. Develop a customer contact system configuration	3.1. Identify and analyse business model to be facilitated by technology 3.2. Identify the required technology components 3.3. Identify all specific ***contact pathways*** to be managed

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ELEMENT	PERFORMANCE CRITERIA
	by technology 3.4. Arrange configuration of technology to satisfy the business model and contact pathways 3.5. Develop comprehensive testing program to ensure delivery and reliability of new configuration 3.6. Evaluate configuration against business model dimensions
4. Develop a strategy to optimise current technology	4.1. Identify unused capacity in existing technology 4.2. Identify applications for unused capacity appropriate to operational or business models 4.3. Develop a strategy for exploiting additional capacity 4.4. Assess the cost and efficiency of the strategy against available resources and budgets 4.5. Recommend a course of action in accordance with the assessment

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to interpret, report and recommend actions from complex data and information
- attention to detail
- interpersonal skills to establish rapport, to build relationships with team members and stakeholders, and to establish effective networks
- literacy skills to develop reports which deal with complex ideas and concepts, and to articulate ideas and information effectively
- numeracy skills to analyse, manipulate and validate data, specifications and reports
- problem-solving skills to develop creative and innovative solutions
- project management skills to ensure that quality project management techniques are employed at all times
- research skills to ensure that all options are explored and recommendations are comprehensive and balanced
- report writing and presentation skills
- risk management skills to ensure that planning is balanced and risk averse.

Required knowledge

- benchmarking principles
- budgeting and cost benefit analysis principles

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- business case preparation principles
- business objectives and goals
- customer contact technologies - communications technologies, automatic call distributor (ACD) systems, interactive voice response (IVR) systems, databases, computer telephony integration (CTI) systems, prescriptive dialling, computer-based customer relationship management (CRM) systems, information management systems
- formal and informal communication and consultation processes, and key personnel related to communication
- needs of both internal and external customers
- operational budget and business plan.

Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • analysis, benchmarking, configuration and optimisation of customer contact technology • knowledge of customer contact technologies.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace information, reporting and data • access to either stakeholder feedback or stakeholders • access to relevant standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation and research related to technology, benchmarking, business objectives, financial imperatives • review of benchmarking reports • review of stakeholder feedback • review of documentation of a strategy for optimising unused capacity in customer contact technology • oral and/or written questioning to assess knowledge

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	of business objectives including financial and business planning • review of risk assessment process.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Customer contact technology may include:	• CRM systems • CTI systems • intranet- or internet-based database systems • local or network-based ACDs • web software systems or other technology which supports customer contact operations
Benchmarking competing technologies may include:	• assessment from specifications and information presented by potential vendors • identifying organisations using different brands or versions of technology and comparing performance and functionality of other options • using operating data and direct testing to compare the performance of two or more competing technology products - analysis is usually performed with reference to the required solution
Critical features may include:	• capacity • compatibility with existing systems • ease of implementation • end user friendliness • future expansion of the connection • speed of operation • support
Contact pathways may include:	• email • traditional telephony call pathways • web pathways

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	• other electronic communication pathways such as fax, short message service (SMS) or chat room

Unit Sector(s)

Information and Communications Technology - IT Analysis and Design

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BSBITB501A Establish and maintain a workgroup computer network

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish a workgroup computer network with an information technology consultant and to manage the network by keeping records, responding to problems, assisting users and providing training. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who are required to apply broad knowledge of computer networks; they may be responsible for installing and maintaining the network, but they will work closely with computer professionals in all aspects of this process. In doing so, they may provide administrative support within an enterprise, or may have been delegated these responsibilities for their workgroup or organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Manage establishment of a workgroup network	1.1. Determine current and anticipated future ***network requirements*** with ***nominated person*** in accordance with organisational policy and budgetary constraints 1.2. Ensure selected network is compatible with current organisational software, hardware and work practices 1.3. Obtain and install ***equipment*** in accordance with organisational requirements and manufacturers' instructions 1.4. Install ***software*** in accordance with organisational requirements and the manufacturers' instructions 1.5. Ensure establishment of network promotes ***efficiency and access for users***
2. Manage maintenance of a workgroup network	2.1. Establish and maintain ***records*** to ensure ***control and security*** of hardware and software stock, in accordance with organisational policy and

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ELEMENT	PERFORMANCE CRITERIA
	procedures 2.2. Respond to ***network problems*** and ***rectify minor faults*** in accordance with organisational requirements 2.3. Report major problems and consult ***computer experts*** in accordance with organisational policy and procedures 2.4. ***File and store software*** in accordance with organisational procedures 2.5. Recommend improvement suggestions for the network to appropriate personnel
3. Assist and train network users	3.1. Provide ***training*** for staff in using the network in accordance with needs 3.2. Assist ***network users*** to ***maximise network potential*** 3.3. ***Examine user skills*** and provide access to appropriate training to improve individual and workgroup efficiency of network use

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to follow complex oral instructions when using new technology, to respond to a complex enquiry or complaint and to give complex instructions • literacy skills to read and interpret complex technical procedures, and to clarify purchasing information on software and hardware for workgroup computer network • research skills to seek information on the most appropriate hardware and software to suit the organisation's needs • problem-solving skills to identify the best course of action if a difficulty arises in operating the workgroup network • teamwork skills to work with others to ensure the success of the network.
Required knowledge
• features of computer networking • key provisions of relevant legislation from all forms of government, codes and

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REQUIRED SKILLS AND KNOWLEDGE
standards that may affect aspects of business operations, such as: • anti-discrimination legislation • ethical principles • codes of practice • privacy laws • copyright • occupational health and safety • organisational policies and procedures relating to the tasks required • software licensing rights and responsibilities.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • applying principles of computer networking • identifying and addressing common problems and arising issues • consulting and negotiating with IT professionals.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and networked computers • access to software.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • demonstration of techniques.
Guidance information for	Holistic assessment with other units relevant to the

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EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended, for example: • other information and communications technology units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Network requirements may include:	• hardware, mainframes, servers • internal/external maintenance • memory size • necessary skills and knowledge • scalability • set up needs • software, operating system, application packages, programming • virus scanners, security requirements
Nominated person may include:	• external consultant • IT department or section • IT manager • management • service provider • supervisor • system users
Equipment may include:	• computers, hardware, peripherals • modem • server, software
Software may include:	• accounting • anti-virus • database • internet • organisation specific software

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RANGE STATEMENT	
	• page layout • printer • spreadsheet • word processing
Efficiency and access for users may include:	• clear instructions or guidelines, user guides • easy to use • eliminates or minimises duplication in electronic storage of information • ensures accuracy and security of data • firewalls • gateways • improves reporting processes • logical set up • maximises access to information • multiple users • reduces processing time • security needs • timely training
Records may include:	• asset register • details of software licences, locations of software within organisation • file register • index cards • inventory lists • log books • requisition forms
Control and security may include:	• allocation of folders and sub-folders • limited number of users, limited time period for usage • monitoring stock level • restricted and authorised access • storage conditions and requirements • use of passwords and log-ins
Network problems may include:	• damaged cabling • human error • memory full • server crashing • virus
Rectifying minor faults may	• anti-virus software • clearing memory space

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RANGE STATEMENT	
include:	• reloading software • repairing or replacing parts • resetting server
Computer experts may include:	• computer service centre • external consultant • IT supervisor or manager • online help • supplier and manufacturer
Filing and storing software may include:	• archiving • creating back-up copy • external storage • file register, electronic or paper-based • fire proof , heat proof , humidity proof storage • organisation records room • organisation storeroom
Training may include:	• expert demonstration • information sessions • one-on-one • workshops
Network users may include:	• organisation personnel • external clients
Maximising network potential may include:	• access to information • effectiveness • efficiency • multiple users • reporting facilities • usefulness
Examining user skills may include:	• observing • surveying • testing and assessment

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Information and Communications Technology - IT Building and Implementation

Co-requisite units

Co-requisite units		

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BSBITB701A Implement advanced electronic technologies

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to improve business, learning and knowledge outcomes through implementing advanced electronic technologies, as a member of a senior management team. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to leaders or managers working to ensure learning advances individual and organisational capabilities. Leaders in learning should be able to implement advanced electronic technologies such as those associated with electronic business (e business) models; electronic retail (e retail) sales, service and payment solutions; mobile and wireless technologies; and technologies relating to the management of the supply chain. Operational management in relation to introducing technologies to enhance business processes may involve complex judgements. This unit may relate to learning activities within a small to medium sized organisation or to a significant unit of activity in a large organisation.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Implement electronic technologies to advance business models	1.1. Determine and ***communicate to stakeholders*** the ***commercial set up*** of the business to supply electronic commerce (e-commerce) products or services 1.2. Analyse and evaluate ***e-business models*** appropriate to a specific operational context 1.3. Implement ***arrangements for conducting e-commerce*** appropriate to ***data*** management, and ***business and organisational requirements*** 1.4. Ensure e-business models interoperate technically and operationally with organisation's management of customer service, performance, learning and decision support

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ELEMENT	PERFORMANCE CRITERIA
	1.5. Implement ***customer authentication and transaction systems*** appropriate to business and organisational requirements 1.6. Review and report opportunities to improve e-commerce infrastructure, systems and solutions
2. Implement electronic technologies to advance retail sales operations	2.1. Determine and communicate to stakeholders the commercial set up of the business to supply e-retail services 2.2. Analyse and evaluate appropriate e-retail tools and processes 2.3. Align e-retail strategy with business strategies, and business and organisational requirements 2.4. Implement arrangements for conducting e-retailing appropriate to business and organisational requirements 2.5. Review and report opportunities to improve e-retail infrastructure, systems and solutions
3. Implement electronic technologies to advance mobile operations	3.1. Identify and communicate to stakeholders, range of options available in ***mobile computing devices*** and ***mobile technologies*** appropriate to business unit and organisational requirements 3.2. Confirm trends in ***mobile commerce*** and related systems 3.3. Research trends in mobile internet and other communication networks 3.4. Implement arrangements for mobile commerce and related systems appropriate to business and organisational requirements 3.5. Review and report opportunities to improve mobile electronic infrastructure, systems and solutions
4. Implement electronic technologies to advance supply chain management	4.1. Determine and communicate to stakeholders the commercial set up of the business to electronically manage a ***supply chain*** 4.2. Research and report strengths and weaknesses of options relating to electronic enhancement of supply chain management 4.3. Develop electronic supply chain model and strategy 4.4. Align supply chain management with e-business strategies and model 4.5. Implement electronic supply chain model 4.6. Review and evaluate electronic supply chain model

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ELEMENT	PERFORMANCE CRITERIA
	against business and organisational requirements 4.7. Determine and report enhancements to electronic enablement of supply chain

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication and teamwork skills to consult with stakeholders and system users
• problem-solving, initiative and enterprise skills to:
  • assess vulnerabilities in e-commerce systems and infrastructure set up
  • manage risks and implications of electronic payment systems
  • monitor business customer satisfaction
  • map business customer needs and expectations
  • evaluate competitive technologies for implementing electronic payments
• teamwork skills to provide leadership in occupational health and safety (OHS) practice and observance of ethical standards, legislative requirements and good corporate governance requirements
• technology skills to:
  • use appropriate technology to achieve system and business outcomes
  • use appropriate terminology
  • use high levels of accounting (mathematical), technological and e-commerce systems
  • assess suitability and reliability of hardware and software
  • compare and recommend new technology solutions that have potential to improve organisational outcomes.

Required knowledge
• business policies and procedures impacting on job role or function • capabilities and limitations of infrastructure • customer needs • electronic payment and processing • facilities and infrastructural management • information sources on product and supply arrangements for customers • manufacturers' specifications for use and maintenance of equipment and systems • methods for assuring safe and secure payment using electronic medium

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REQUIRED SKILLS AND KNOWLEDGE
• planning techniques • principles of supply chain management • quality measures and principles • relevant legislation, codes and regulations that affect business operations, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant obligations under the Australian Quality Training Framework (AQTF) Standards for Registered Training Organisations • resource investment and maintenance solutions • resource requirements and limitations • secure electronic system for merchant transactions • technology underlying secure transmission and verification of information • trends in business to business e-commerce and e-business systems • written policies and internal procedures on trading, e-trading and associated contractual documents.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • research and evaluation of appropriate electronic technology for a given business system • capacity to analyse, develop and implement plans for an effective e-business solution, e-retail solution, mobile business solution and electronic supply chain management solution to meet specific organisational needs • knowledge of methods for assuring safe and secure payment using electronic medium.
Context of and specific resources for assessment	Assessment must ensure: • competence is consistently demonstrated over time, and over a range and variety of situations • access to required assessment facilities and resources.

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of applied projects or learning activities, for instance related to implementing effective electronic solutions across e-commerce, mobile, e-retail and electronic supply chain management for a specific business requirement • direct observation of contextual application of skills • oral or written questioning to assess knowledge of capabilities and limitations of infrastructure • review of research and evaluation of the appropriate electronic technology for a given business system.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLED704A Review enterprise e-learning systems and solutions implementation.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Communication to stakeholders includes:	• electronic or physical means to inform:
	  • business partners
	  • customers
	  • executive management
	  • other employees
	  • public
	  • public agencies, especially regulators

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RANGE STATEMENT	
	• shareholders • suppliers
Commercial set up may include:	• business to business (B2B) • business to customer (B2C) • business to government (B2G) • customer to customer (C2C)
E-business models may include such typologies as:	• advertising model • affiliate model • auction model • barter model • catalogue model • channel model • exchange model
Arrangements for conducting e-commerce may vary with:	• access • commercial set up of trading company • content (product, data and information) • payment methods • services • software • supply arrangements
Data may include:	• electronic catalogues • electronic data interchange (EDI) • inventory data • logistics databases • product shipment data • real-time warehouse inventory status
Business and organisational requirements may include:	• access and equity principles and practices • business and performance plans • collaborative or partnership arrangements • confidentiality requirements • defined resource parameters • ethical standards • existing technology, systems and processes such as electronic resource planning (ERP) and electronic performance or decision support systems (EPS) • goals, objectives, plans, systems and processes • legal and organisational policies, guidelines and requirements • OHS policies, procedures and programs

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RANGE STATEMENT	
	• quality and continuous improvement processes and standards • quality assurance or procedures manuals • recording and reporting procedures • team and business unit structures and focus
Customer authentication and transaction systems may include:	• clearance systems • credit card transactions • customer authentication • customer service team structure and orientation • dishonour systems • electronic bill payment • electronic presentment • fulfilment requirements • payment gateways • privacy compliance
Mobile computing devices may include devices with a data processor such as:	• handheld computing devices • mobile cellular telephones • mobile computers • personal digital assistants (PDAs)
Mobile technologies may include:	• location and telemetry devices (such as global positioning system) • network connection typology (such as wireless, cellular, satellite) • RFID (Radio Frequency Identification), barÂ coding and scanning technology • WAP (wireless application protocol) to allow personnel to access logistics databases via handheld or palm-sized devices
Mobile commerce includes:	• all activities related to the use of mobile or wireless information and communication technologies (ICTs) to communicate, interact, entertain and transact any time, anywhere, any place across public or private networks
Supply chain includes:	• entire cycle from raw materials to producers, component suppliers, manufacturers, wholesalers, third party service providers, retailers, customers and recyclers, freight, distribution and cash flow

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Building and Implementation

Co-requisite units

Co-requisite units		

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BSBITS401B Maintain business technology

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required skills updated to focus on learning and development practices and compliance with policy and procedures. Replaces BSBITS401A Maintain business technology

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to maintain the effectiveness of business technology in the workplace. It includes maintaining existing technology and planning for future technology requirements.

Application of the Unit

This unit applies to individuals with a broad knowledge of business technology who contribute well developed skills in creating solutions to maintenance and upgrade issues with existing technology. They may have responsibility to provide guidance or to delegate aspects of these tasks to others.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Maintain performance of hardware and software	1.1 Monitor and evaluate system effectiveness to ensure it meets ***organisational and system requirements***
	1.2 Use operating system, drive and disk structure, reports and files to identify performance problems
	1.3 ***Maintain disk drives and peripherals*** according to manufacturers' and organisational requirements
	1.4 Replace ***consumables*** in accordance with manufacturers' and organisational requirements
2. Provide basic system administration	2.1 Carry out system back-up procedure at regular intervals according to organisational and system requirements
	2.2 Install and operate ***software*** applications in accordance with developers' and organisational requirements
	2.3 Maintain and update security access procedures in line with organisational requirements
	2.4 Ensure that licence for use of software is used, checked and recorded in accordance with organisational requirements
	2.5 Regularly maintain and update virus programs in accordance with organisational requirements
3. Identify future technology requirements	3.1 Maintain knowledge of current and new ***technology*** by regularly accessing ***sources of information***
	3.2 Identify and develop ***improved technology systems*** using feedback from clients and colleagues
	3.3 Assess existing technology against newly available technology to determine future needs and priorities
	3.4 Identify and select new technologies to achieve and maintain continuous organisational development
	3.5 Obtain management and budget approval for new selected

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	technologies

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to explain the operation and troubleshooting of technology in the work environment
- literacy skills to interpret and evaluate the purposes and objectives of various uses of technology; to display logical organisation of written information
- problem-solving skills to address routine and non-routine faults with hardware and software
- research and analytical skills to analyse and identify organisation's future technology requirements.

Required knowledge

- costs and benefits of technology maintenance strategies
- general features and capabilities of current industry accepted hardware and software products
- principles of environmental sustainable practice in implementing business technology
- importance of back-up and security procedures; maintenance and diagnostic procedures; licensing, installation and purchasing procedures
- key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - environmental issues
  - occupational health and safety (OHS).

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	

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Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • installing software and hardware • organising and accessing software, materials and consumables • maintaining technology security and maintenance systems • knowledge of costs and benefits of technology maintenance strategies.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of technology maintenance and security procedures.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of general features and capabilities of current industry accepted hardware and software products.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other information and communications technology or general administration units.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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Organisational and system requirements may include:	• back-up procedures • Code of Conduct • ethical standards • legal and organisational policy/guidelines and requirements • maintenance of customised software • OHS policies, procedures and programs • quality assurance and/or procedures manuals • register of licenses • restore procedures • security and confidentiality procedures • software licence documentation • storage of information technology documentation • storage retrieval and type of product licenses • updating of virus protection systems.
Disk drive and peripherals maintenance may include:	• backing up files before major maintenance • checking hard drive for errors • cleaning dust from internal and external surfaces • creating more free space on the hard disk • defragmenting the hard disk • deleting unwanted files • reviewing programs • using up-to-date anti-virus programs.
Consumables may include:	• disks • magnetic tape and cassettes • print heads • print media • printer ribbons and cartridges.
Software may include:	• accounting applications • commercial software applications • database applications • internet/intranet/extranet related programs • organisation-specific software • presentation applications • spreadsheet applications • word processing applications.
Technology may include:	• client services • computers • data transfer devices • modems • peripherals, including:

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	• printers, scanners, tape cartridges • speakers, multimedia kits • personal computer, modems • input equipment such as mouse, touch pad, keyboard, pens • mobile phones, palmtops and personal digital assistants (PDAs), laptops and desktop computers • Bluetooth devices, universal serial bus (USB), Firewire (IEEE 1394) • photocopiers • printers • scanners • software.
Sources of information may include:	• computer hardware manufacturers • computer magazines and journals • computer software designers • industry associations • internal/external clients • internet • retail outlets • seminars, workshops and training sessions • trade fairs.
Improved technology systems may include:	• access protocols • cable data transmissions • delivery and installation systems • hardware upgrades • implementing a new system • maintenance options • multimedia • networking options • new hardware • new software • resource usage monitoring • software upgrades • environmentally sustainable design practices.

Unit Sector(s)

Information and Communications Technology – IT Support

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Custom Content Section

Not applicable.

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BSBITU101A Operate a personal computer

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to start up a personal computer or business computer terminal; to correctly navigate the desktop environment; and to use a range of basic functions. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals developing basic skills and knowledge of personal computer operation in preparation for working in a broad range of settings.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Start computer, system information and features	1.1. Adjust workspace, furniture and equipment to suit user ***ergonomic requirements***
	1.2. Ensure ***work organisation*** meets organisational and ***occupational health and safety*** (***OHS***) ***requirements*** for computer operation
	1.3. Start computer or log on according to user procedures
	1.4. Identify basic functions and features using system information
	1.5. Customise desktop configuration, if necessary, with assistance from appropriate persons
	1.6. Use help functions as required
2. Navigate and manipulate desktop environment	2.1. Open, close and access features by selecting correct ***desktop icons***
	2.2. Open, resize and close desktop windows by using correct window functions and roles
	2.3. Create shortcuts from the desktop, if necessary, with assistance from appropriate persons
3. Organise files using basic directory and folder structures	3.1. Create folders/subfolders with suitable names
	3.2. Save files with suitable names in appropriate folders
	3.3. Rename and move folders/subfolders and files as required
	3.4. Identify folder/subfolder and ***file attributes***
	3.5. Move folders/subfolders and files using cut and paste, and drag and drop techniques
	3.6. Save folders/subfolders and files to ***appropriate***

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ELEMENT	PERFORMANCE CRITERIA
	media where necessary 3.7. Search for folders/subfolders and files using appropriate software tools 3.8. Restore deleted folder/subfolders and files as necessary
4. Print information	4.1. Print information from installed printer 4.2. View progress of print jobs and delete as required 4.3. Change default printer if installed and required
5. Shut down computer	5.1. Close all open applications 5.2. Shut-down computer according to user procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to identify work requirements, to comprehend basic workplace documents, to interpret basic user manuals and to proofread simple documents
- communication skills to identify lines of communication, to request advice, to effectively question, to follow instructions and to receive feedback
- problem-solving skills to solve routine problems in the workplace, while under direct supervision
- technology skills to use equipment safely while under direction, basic keyboard and mouse skills and procedures relating to logging on and accessing a computer
- basic typing techniques and strategies.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - OHS
- basic ergonomics of computer use
- main types and parts of computers, and basic features of different operating systems
- suitable file naming conventions.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • navigation and manipulation of the desktop environment within the range of assigned workplace tasks • knowledge of organisational requirements for simple documents and filing conventions • application of simple keyboard functions to produce documents with a degree of speed and accuracy relevant to the level of responsibility required.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of workplace documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • demonstration of techniques • oral or written questioning to assess knowledge of computer operations and functions • review of shortcuts created • review of folders/subfolders created.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBITU102ADevelop keyboard skills • other general administration units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position • lighting • noise minimisation • posture • screen position • workstation height and layout
Work organisation may include:	• exercise breaks • mix of repetitive and other activities • rest periods • visual display unit (VDU) eye testing
Occupational health and safety requirements may include:	• OHS guidelines related to the use of the screen equipment, computing equipment and peripherals, ergonomic work stations, security procedures, customisation requirements • statutory requirements
Desktop icons include:	• directories/folders • files • network devices • recycle bin and waste basket
File attributes include:	• dates • size
Appropriate media may include:	• CDs • diskettes • local hard drive • other locations on a network • USB/ Flash/Thumb drives • zip disks

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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BSBITU102A Develop keyboard skills

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop basic keyboard skills using touch typing techniques. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals developing skills and knowledge of basic keyboarding techniques in preparation for working in a broad range of settings.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Use safe work practices	1.1. Adjust workspace, furniture and equipment to suit user ***ergonomic requirements*** 1.2. Ensure ***work organisation*** meets organisational and occupational health and safety (OHS) requirements for computer operation
2. Identify and develop keyboard skills	2.1. Identify and apply keyboard functions for both alpha and numeric keyboard functions 2.2. Apply ***touch typing technique*** to complete a task 2.3. Develop ***speed and accuracy*** in accordance with workplace requirements for level of responsibility
3. Check accuracy	3.1. Proofread document carefully to identify errors 3.2. Amend document, correct errors and complete a final accuracy check

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

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REQUIRED SKILLS AND KNOWLEDGE
• communication skills to identify lines of communication, to request advice, to effectively question, to follow instructions and to receive feedback • literacy skills to identify work requirements, to comprehend basic workplace documents, and to produce and proofread simple documents • problem-solving skills to solve routine problems in the workplace, while under direct supervision • technology skills to use equipment safely while under direction, and to use basic keyboard, touch typing and mouse skills to produce simple documents.
Required knowledge
• key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as OHS • organisational benchmarks for keyboarding.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • applying touch typing technique to enter alphanumeric characters • safely using keyboard.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of workplace documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • demonstration of techniques

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EVIDENCE GUIDE	
	• oral or written questioning to assess knowledge of keyboard operations and functions • review of completed documents.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBITU101A Operate a personal computer • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position • lighting • noise minimisation • posture • screen position • workstation height and layout
Work organisation may include:	• exercise breaks • mix of repetitive and other activities • rest periods • visual display unit (VDU) eye testing
Touch typing technique may vary according to:	• level of competency of operator • workplace requirements
Speed and accuracy must be:	• consistent with degree of experience of operator • relevant to level of responsibility

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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BSBITU201A Produce simple word processed documents

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to correctly operate word processing applications in the production of workplace documents. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who perform a range of routine tasks in the workplace, using a limited range of practical skills and fundamental knowledge of word processing and software in a defined context, under direct supervision or with limited individual responsibility.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare to produce documents	1.1. Use safe work practices to ensure ***ergonomic***, ***work organisation***, energy and resource ***conservation requirements*** are addressed 1.2. Identify ***document*** purpose, audience and presentation requirements, and clarify with relevant personnel as required 1.3. Identify ***organisational*** and task ***requirements*** for document layout and design
2. Produce documents	2.1. ***Format*** document using appropriate ***software functions*** to adjust page layout to meet information requirements, in accordance with organisational style and presentation requirements 2.2. Use system features to identify and manipulate ***screen display options and controls*** 2.3. Use manuals, user documentation and online help to overcome problems with document presentation and production
3. Finalise documents	3.1. Ensure final document is previewed, ***checked***, adjusted and ***printed*** in accordance with organisational and task requirements 3.2. Ensure document is prepared within ***designated time lines*** and organisational requirements 3.3. ***Name and store document*** in accordance with organisational requirements and exit application

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ELEMENT	PERFORMANCE CRITERIA
	without information loss/damage

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to clarify document requirements • editing and proofreading skills to check own work for accuracy • keyboarding skills to enter text and numerical data • literacy skills to read and understand organisation's procedures, and to use basic models to produce a range of correspondence • problem-solving skills to solve routine problems.
Required knowledge
• formatting styles and their effect on formatting, readability and appearance of documents • purpose, use and function of word processing software • organisational requirements for ergonomics, work periods and breaks, and conservation techniques • organisational style guide.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • knowledge of simple word processing functions, standard document layout and design principles • production of a minimum of three simple, word processed documents.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of word processed documents and style guides.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of formatted document • review of final document • demonstration of techniques • oral or written questioning to assess knowledge of word processing software functions.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • general administration units • other IT use units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position

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RANGE STATEMENT	
	• lighting • noise minimisation • posture • screen position • workstation height and layout
Work organisation requirements may include:	• exercise breaks • mix of repetitive and other activities • rest periods
Conservation requirements may include:	• disposing of non-confidential waste paper in recycling bins • double-sided paper use • re-using paper for rough drafts (observing confidentiality requirements) • utilising power-save options for equipment
Documents may include:	• agendas • briefing papers • envelopes • faxes • labels • letters • mail merges • memos • minutes • short reports • simple one-page flyers • standard form letters
Organisational requirements may include:	• company colour scheme • company logo • consistent corporate image • content restrictions • established guidelines and procedures for document production • house styles • observing copyright legislation • organisation name, time, date, document title, filename etc. in header/footer • templates
Formatting may include:	• alignment on page • columns • company logo/letterhead

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RANGE STATEMENT	
	• enhancements to format - borders, patterns and colours • enhancements to text - colour, size, orientation • headers/footers • margins • page orientation
Software functions may include:	• default settings • document protection • grammar check • headers/footers • indent • line spacing • page numbers • page set up • paragraph formatting • spell check • tabs • text formatting
Screen display options and controls may include:	• layout view • maximise/minimise • normal view • page view • print preview • ruler • toolbars • zoom percentage
Checking may include:	• accuracy of information • consistency of layout • ensuring instructions with regard to content and format have been followed • grammar • proofreading • spelling, electronically and manually
Printing may include:	• basic print settings • multiple copies • odd or even pages • print preview • printer setup • specified pages • whole document

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RANGE STATEMENT	
Designated time lines may include:	• organisational time line e.g. deadline requirements • time line agreed with internal/external client • time line agreed with supervisor/person requiring document/s
Naming and storing documents may include:	• appropriate file type • authorised access • file names according to organisational procedure e.g. numbers rather than names • file names which are easily identifiable in relation to the content • file/directory names which identify the operator, author, section, date etc. • filing locations • organisational policy for backing up files • organisational policy for filing hard copies of documents • security • storage in folders/sub-folders • storage on hard/floppy disk drives, CD-ROM, tape back-up

Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBITU202A Create and use spreadsheets

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to correctly create and use spreadsheets and charts through the use of spreadsheet software. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who perform a range of routine tasks in the workplace using a limited range of practical skills and fundamental knowledge of creating spreadsheets in a defined context under direct supervision or with limited individual responsibility.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Select and prepare resources	1.1. Adjust workspace, furniture and equipment to suit user ***ergonomic***, ***work organisation*** and occupational health and safety (OHS) ***requirements*** 1.2. Use energy and resource ***conservation techniques*** to minimise wastage in accordance with organisational and statutory requirements 1.3. Identify ***spreadsheet task requirements*** and clarify with relevant personnel as required
2. Create simple spreadsheets	2.1. Ensure ***data*** is entered, ***checked*** and amended in accordance with organisational and task requirements, to maintain consistency of design and layout 2.2. ***Format*** spreadsheet using ***software functions***, to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements 2.3. Ensure ***formulae*** are used and tested to confirm output meets task requirements, in consultation with appropriate personnel as required 2.4. Use manuals, user documentation and online help to overcome problems with spreadsheet design and production
3. Produce simple charts	3.1. Select ***chart type*** and design that enables valid representation of numerical data and meets

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ELEMENT	PERFORMANCE CRITERIA
	organisational and task requirements 3.2. Create chart using appropriate data range in the spreadsheet 3.3. Modify chart type and layout using formatting ***features***
4. Finalise spreadsheets	4.1. Ensure spreadsheet and any accompanying charts are previewed, adjusted and ***printed*** in accordance with organisational and task requirements 4.2. Ensure data input meets ***designated time lines*** and organisational requirements for speed and accuracy 4.3. Name and ***store*** spreadsheet in accordance with organisational requirements and exit the application without data loss/damage

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to clarify requirements of spreadsheet
- editing and proofreading skills to check own work for accuracy
- keyboarding skills to enter text and numerical data
- literacy skills to read and understand organisation's procedures, and to use basic models to produce a range of spreadsheets
- numeracy skills to create and use spreadsheet formulae.

Required knowledge

- formatting of workplace documents
- organisational requirements for ergonomic standards, work periods and breaks, and conservation techniques
- organisational guidelines on spreadsheet manipulation and processing
- purpose and range of use of spreadsheet functions.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • designing a minimum of two spreadsheets • using cell-based formulae • creating charts using relevant data • knowledge of purpose and range of use of spreadsheet functions.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of spreadsheets and simple formulae.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of final spreadsheets • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of spreadsheet software functions.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • general administration units • other IT use units.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position • lighting • noise minimisation • posture • screen position • workstation height and layout
Work organisation requirements may include:	• exercise breaks • mix of repetitive and other activities • rest periods
Conservation techniques may include:	• double-sided paper use • recycling used and shredded paper • re-using paper for rough drafts (observing confidentiality requirements) • utilising power-save options for equipment
Spreadsheet task requirements may include:	• data entry • output • presentation • storage
Data may include:	• numbers • text
Checking may include:	• accuracy of data • accuracy of formulae with calculator • ensuring instructions with regard to content and format have been followed • proofreading • spelling, electronically and manually
Formatting may include:	• alignment on page • efficiency of formulae • enhancements to format - borders, patterns and

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RANGE STATEMENT	
	colours • enhancements to text • headers/footers • use of absolute and relative cell addresses • use of cell addresses in formulae
Software functions may include:	• adding/deleting columns/rows • formatting cells • formatting text • headers/footers • sizing columns/rows
Formulae may include:	• absolute cell referencing and/or mixed references • average • division • maximum • minimum • multiplication • subtraction • sum • combinations of above
Chart types may include:	• area • bar • column • exploded pie • line • pie and 3-D pie • scatter/bubble • stacked/multiple bar • stacked, 3-D column
Features may include:	• axes • axis title • borders • chart title • colours • data labels • data tables • fills • gridlines • legend • lines

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RANGE STATEMENT	
	• patterns
Printing may include:	• fit on one page • fit specific number of pages • with formulae • with values
Designated time lines may include:	• organisational time line e.g. financial requirements • time line agreed with internal/external client • time line agreed with supervisor/person requiring spreadsheet
Storing data may include:	• authorised access • filing locations • organisational policy for backing up files • organisational policy for filing hard copies of spreadsheets • security • storage in electronic folders/sub-folders • storage on CD-ROM, zip drives, USB memory

Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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BSBITU203A Communicate electronically

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to send, receive and manage electronic mail (email), as well as to collaborate online using chat rooms, intranets and instant messaging. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who use business technology to perform a range of routine tasks to communicate with co workers, customers or others. The individual will use a limited range of practical skills and fundamental knowledge in a defined context under direct supervision or with limited individual responsibility.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Implement procedures to send and receive electronic mail	1.1. Log in to ***software*** for sending and receiving email in accordance with ***organisational requirements*** 1.2. ***Check outgoing email for accuracy*** and ensure any required ***attachments*** are prepared, in accordance with organisational and service provider requirements 1.3. Identify urgent, confidential, personal, ***suspicious or potentially dangerous email*** and take appropriate actions 1.4. ***Deal with returned email*** in accordance with organisational policies and procedures
2. Manage electronic mail	2.1. Set security levels and/or filters for incoming email in accordance with organisational requirements 2.2. Create and maintain individual mailboxes in accordance with organisational requirements 2.3. ***Store email*** and/or attachments in accordance with organisational requirements 2.4. Empty inboxes and archive or permanently delete in accordance with organisational requirements 2.5. Prepare and maintain electronic ***mailing lists*** in accordance with organisational requirements
3. Collaborate online	3.1. Identify software to be used in collaboration 3.2. Ensure ***online collaboration*** is undertaken in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with organisational policy, procedures and ***net etiquette*** (netiquette) 3.3. Respond to posts or communications in accordance with agreed parameters, organisational requirements and netiquette

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to request advice, to receive feedback and to work with a team • literacy skills to identify work requirements; to understand and process basic, relevant workplace information; and to draft simple correspondence • problem-solving skills to solve routine technology problems.
Required knowledge

• different methods of electronic communication
• key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • occupational health and safety.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • sending and receiving email for a range of purposes • attaching and removing documents to email • using software applications to collaborate online • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to software applications likely to be used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of electronic communication methods and tools • review of attachments prepared for email • review of electronic mailing lists • evaluation of postings and responses to online discussions.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • general administration units • other IT use units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating

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RANGE STATEMENT	
conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Software may include:	• mobile or wireless software applications:
	  • personal digital assistants (PDA)
	  • mobile phones
	  • text messaging (SMS/TXT)
	  • multimedia messaging (MMS)
	  • internet relay chat (IRC)
	• personal computer-based software applications:
	  • email applications
	  • web-based email services
	  • chat applications
	  • internet discussion groups/boards/chat rooms
	  • intranet discussion groups/boards/chat rooms

Organisational requirements may include:	• carbon copies or blind carbon copies • concise, relevant subject line • electronic signature • form of address • formality/informality of language, tone and structure • including original message in the reply • length of emails (i.e. short and to the point) • net ethics • net etiquette(netiquette) • requesting read receipt • sender's name and address
Checking outgoing email for accuracy may include checking:	• clarity of intended meaning • completeness • content • grammar • punctuation • recipient's address • spelling • structure
Attachments may include:	• PDFs

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RANGE STATEMENT	
	• pictures • spreadsheets • word processed documents • any electronic file
Suspicious or potentially dangerous email may include:	• attachments • email where sender is unknown, and subject line is enticing and/or personal (e.g. urging the receiver to open immediately) • particular file extensions • spam (unsolicited commercial email or junk email) • unsolicited email containing viruses
Dealing with returned email may include:	• checking email address • checking size of attachment/s • re-sending • sending message by other means e.g. facsimile, post • telephoning addressee
Storing email may include:	• email application software • paper-based filing system • specialised recordkeeping, spreadsheet or database software
Mailing lists may include:	• database or spreadsheet records • electronic address books • word processing tables or data files
Online collaboration may include:	• chat rooms • email communications • instant messaging • intranet
Net etiquette may include:	• accepted (not mandated) rules for being a good net citizen (netizen) • adjust to the style and tone of discussion groups • be forgiving of other's mistakes • do not abuse your power • if you would not do it in real life do not do it in cyberspace • keep flames under control (flaming is making personal attacks on others) • look good online (spelling, grammar, and have

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RANGE STATEMENT	
	something worth saying) • protocols for discussion groups • remember you are dealing with real people not computers • respect copyright • respect other people's privacy • respect other's time and bandwidth • share expert knowledge

Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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BSBITU301A Create and use databases

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to create simple two table relational databases with reports and queries, for the storage and retrieval of information. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who develop and use simple databases to store and retrieve data. They may provide administrative support within an enterprise, or may be independently responsible for the storage and retrieval of data relating to their own work roles.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Create a simple database	1.1. Design a simple database, with at least two tables, using a ***database application***, ***basic design principles***, ***software functions*** and ***simple formulae*** 1.2. Develop a table with fields and attributes according to database usage, as well as ***data*** considerations and user requirements 1.3. Create a primary key for each table 1.4. Modify table layout and field attributes as required 1.5. Create a relationship between the two tables 1.6. ***Check and amend data*** entered, in accordance with organisational and task requirements
2. Create reports and queries	2.1. Determine information output, database tables to be used and ***report layout*** to meet task requirements 2.2. Determine data groupings, search and sort criteria to meet task requirements 2.3. Run reports and queries to check that results and formulae provide the required data 2.4. Modify reports to include or exclude additional requirements
3. Use database	3.1. Ensure data input meets ***designated time lines*** and organisational requirements for speed and accuracy 3.2. Use manuals, user documentation and online help to overcome problems with database design and

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ELEMENT	PERFORMANCE CRITERIA
	production 3.3. Preview, adjust and ***print*** database reports or forms in accordance with organisational and task requirements 3.4. Name and ***store databases***, in accordance with organisational requirements, and exit application without data loss or damage 3.5. Prepare and distribute reports to appropriate person in a suitable format

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- numeracy skills to create simple queries and to use simple formulae
- planning and organising skills to develop effective databases
- problem-solving skills to address inconsistencies in data and issues in database, and to query structures.

Required knowledge

- key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety
- organisational requirements relating to data entry, storage and presentation.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • creating simple databases and queries • manipulating data using queries • formatting data into a final version.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to sample data.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • demonstration of techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other information and communications technology units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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RANGE STATEMENT	
Database applications may include:	• commercial database applications • organisational specific database applications
Basic design principles may include:	• naming conventions • data layout • formatting • database use • required output • reporting and presentation requirements
Software functions may include:	• adding, deleting, moving, re-labelling fields • altering field widths • calculating, using formula • data protection • field definitions and attributes • formatting fields • formatting text • headers and footers • inserting and deleting blank lines and spaces • repeating (if available) • table, form and report wizards
Simple formulae may include:	• average • count • division • maximum • minimum • multiplication • subtraction • sum • combinations of above
Data may include:	• numbers • text
Checking and amending data may include:	• accuracy of data • accuracy of formulae with calculator • ensuring instructions with regard to content and format have been followed • outcome of sorting or filtering • proofreading • spelling, electronically and manually
Report layout may include:	• alignment on page • columns

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RANGE STATEMENT	
	• enhancements to format - borders, patterns and colours • enhancements to text • formatting provided through use of a wizard or other automated process • headers/footers • logical ordering of data • tables
Designated time lines may include:	• time line agreed with internal or external client • time line agreed with supervisor or person requiring database
Printing may include:	• forms • queries • records • reports • tables
Storing databases may include:	• authorised access • filing locations • naming conventions • organisational policy for backing up files • organisational policy for filing hard copies of databases • security • storage in electronic folders and sub-folders • storage on disk drives, CD-ROM, back-up tapes

Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and communications Technology - IT use

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Co-requisite units

Co-requisite units		

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BSBITU302B Create electronic presentations

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to design and produce electronic presentations for speakers, for self access and for online access. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who design electronic presentations. They may work as individuals providing administrative support within an enterprise, or may be responsible for production of their own electronic presentations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare to create presentation	1.1. Organise personal work environment in accordance with ***ergonomic requirements*** 1.2. Determine purpose, audience and ***mode of presentation*** in consultation with content author or presenter 1.3. Identify ***presentation requirements*** in terms of supporting documents, transparencies and equipment 1.4. Apply ***work organisation strategies*** and ***energy and resource conservation techniques*** to plan work activities
2. Create presentation	2.1. Design slides, notes and handout masters to incorporate ***organisational and task requirements*** in relation to image and preferred style, avoiding ***distractions*** 2.2. Use ***software functions*** for consistency of design and layout, to meet identified presentation requirements 2.3. Balance ***presentation features*** for visual impact and emphasis 2.4. Use ***advanced software features*** to streamline and customise the presentation for different audiences 2.5. Prepare presentations within ***designated time lines***
3. Finalise presentation	3.1. Use manuals, user documentation and online help to

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ELEMENT	PERFORMANCE CRITERIA
	overcome problems with design and production 3.2. Check presentation for spelling, consistency in presentation features and style, in accordance with task requirements 3.3. Print ***presentation materials*** in accordance with presenter or audience requirements 3.4. ***Store presentation***, in accordance with organisational requirements and exit the application without information loss or damage

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to clarify requirements of documents • keyboarding skills to enter text and numerical data • literacy skills to read and understand organisational procedures, to use screen layout to support text structure, and to proofread and edit documents • problem-solving skills to use processes flexibly and interchangeably.
Required knowledge
• key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as: • anti-discrimination legislation • ethical principles • codes of practice • privacy laws • occupational health and safety • effect of design features on readability and appearance of electronic presentations.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the

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EVIDENCE GUIDE	
performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • creating at least two electronic presentations
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of electronic presentations and style guides.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of presentation materials • demonstration of techniques • oral or written questioning to assess knowledge of word processing software functions.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other business services units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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RANGE STATEMENT	
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position • lighting • noise minimisation • posture • screen position • workstation height and layout
Mode of presentation may include:	• available for browsing by individuals • display on one computer, control from another • online, internet, intranet • conference presentation • self-running presentation • speaker
Presentation requirements may include:	• 35 mm slides • annotation pen • computer equipment and peripherals for on-screen presentation • data show • digital pointer • handouts • internet access • laptop computer • network access • outlines • overhead projector • overhead transparencies • paper printouts of presentation or slide show • slide projector • speaker notes • video projector/s • world wide web documents
Work organisation strategies may include:	• exercise breaks • mix of repetitive and other activities • rest periods
Energy and resource conservation techniques may include:	• double-sided paper use • recycling used and shredded paper • re-using paper for rough drafts (observing

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RANGE STATEMENT	
	confidentiality requirements) • using power-save options for equipment
Organisational and task requirements may include:	• company colour scheme • company logo • corporate image • music • organisation name, time, date, occasion etc. in header/footer • organisational video clip
Distractions may include:	• heavy colour • insufficient colour separation (background to text) • irrelevant animation • multiple transitions • overly busy background • overuse of sound • too many words or pictures per slide • too small fonts
Software functions may include:	• backgrounds • colour schemes • creating templates • handout master • importing outlines from other applications • importing images and graphics • notes master • placeholders • slide master
Presentation features may include:	• animation • charts • graphics • headlines or titles • illustrations • logos • music • objects • pace • pictures • sound • text content • timing

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RANGE STATEMENT	
	• transitions • video clips
Advanced software features may include:	• agenda slides • presentation within a presentation - custom show
Designated time lines may include:	• organisational time line e.g. conference deadline requirements • timeline agreed with internal or external client • timeline agreed with supervisor or person requiring presentation
Presentation materials may include:	• handouts • outlines • overhead transparencies • paper printouts of presentation/slide show • speaker notes • 35 mm slides • world wide web documents
Storing presentations may include:	• authorised access • filing locations • organisational policy for backing up files • organisational policy for filing hard copies • security • storage in folders or sub-folders • storage on disk drives, USB, CD-ROM, backup tapes, server

Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Use

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Co-requisite units

Co-requisite units		

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BSBITU303A Design and produce text documents

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to design and develop predominantly text based documents using advanced features of word processing software. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who possess fundamental skills in computer operations and keyboarding, and basic skills in the operation of word processing software. They may work as individuals who provide administrative support within an enterprise, or may be technical/knowledge experts responsible for production of their own word processed documents.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare to produce word processed documents	1.1. Use safe work practices to ensure ***ergonomic***, ***work organisation***, ***energy and resource conservation requirements*** are addressed 1.2. Identify ***document*** purpose, audience and presentation requirements, and clarify with relevant personnel as required 1.3. Identify ***organisational*** and task ***requirements*** for text-based business documents to ensure consistency of style and image
2. Design word processed documents	2.1. ***Design*** document ***structure and layout*** to suit purpose, audience and information requirements of the task 2.2. Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout 2.3. Use style sheets and ***automatic functions*** to ensure ***consistency of design and layout***
3. Add tables and other data	3.1. Insert a standard table into a document, changing cells to meet information requirements 3.2. Insert and delete columns and rows as necessary 3.3. Insert images and other ***data*** to meet required

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ELEMENT	PERFORMANCE CRITERIA
	specifications
4. Produce text documents	4.1. Use ***advanced software functions*** to enable efficient production of documents 4.2. Enter or import, and edit text and other data to meet required specifications 4.3. Preview, adjust and ***print*** documents in accordance with organisational and task requirements 4.4. ***Name and store*** text documents, in accordance with organisational requirements and exit the application without information loss/damage 4.5. Prepare text documents within ***designated time lines*** and organisational requirements for speed and accuracy 4.6. Use manuals, user documentation and online help to overcome problems with document design and production

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to clarify requirements of documents
- editing and proofreading skills to check own work for accuracy against original
- keyboarding skills to enter text and numerical data
- literacy skills to read and understand the organisation's procedures, and to use models to produce a range of documents
- problem-solving skills to use processes flexibly and interchangeably.

Required knowledge

- formatting styles and their impact on formatting, readability and appearance of documents
- organisational requirements for ergonomics, work periods and breaks, and conservation techniques
- organisational style guide
- purposes, uses and functions of word processing software.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • applying document design principles • knowledge of organisation's style guide • production of a minimum of three text documents using advanced software functions.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of text documents and style guides.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of word processing software functions • review of text documents.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBWRT301AWrite simple documents • general administration units • other IT use units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position • lighting • noise minimisation • posture • screen position • workstation height and layout
Work organisation requirements may include:	• exercise breaks • mix of repetitive and other activities • rest periods
Energy and resource conservation requirements may include:	• double-sided paper use • recycling used and shredded paper • re-using paper for rough drafts (observing confidentiality requirements) • using power-save options for equipment
Documents may include:	• brochures • calendars • faxes • flyers • forms • mail merge documents, including labels • memos • multi-page letters • promotional material • reports • schedules • tables
Organisational requirements may include:	• company colour scheme • company logo

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RANGE STATEMENT	
	• consistent corporate image • content restrictions • established guidelines and procedures for document production • house styles • observing copyright legislation • organisation name, time, date, document title, filename, etc. in header/footer • templates
Design may include:	• balance • diversity • relative positioning of graphics and headings • simplicity • text flow • typography
Structure and layout may include:	• boxes • colour • columns • drawing • graphics • headings • letter and memo conventions • page layout • photographs • typeface • white space
Automatic functions may include:	• auto correct • auto date • auto format • auto text • default settings • headers and footers • page numbering • styles • table headings
Consistency of design and layout may include:	• annotated references • borders • bullet/number lists • captions • consistency with other business documents

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RANGE STATEMENT	
	• footnotes/endnotes • indentations • page numbers • spacings • typeface styles and point size
Data may include:	• clip art • data from other software applications • digital photographs • files • graphics • quotes • references • scanned photographs and logos • tables, graphs and charts
Advanced software functions may include:	• alternate headers and footers • drawing tools • graphics tools • importing data/objects/pictures • mail merge • newspaper columns • sections • sort • styles • tables • templates
Printing may include:	• print merge • print to file • with comments • with drawing objects • with field codes • with hidden text
Naming and storing documents may include:	• authorised access • file names according to organisational procedure e.g. numbers rather than names • file names which are easily identifiable in relation to the content • file/directory names which identify the operator, author, section, date • filing locations • organisational policy for backing up files,

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RANGE STATEMENT	
	storage in folders/sub-folders • organisational policy for filing hard copies of documents • security/password protection • storage on hard/floppy disk drives, CD-ROM, tape back-up
Designated time lines may include:	• organisational time line e.g. deadline requirements • time line agreed with internal/external client • time line agreed with supervisor/person requiring document

Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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BSBITU304A Produce spreadsheets

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop spreadsheets through the use of spreadsheet software. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of environments who require skills in the creation of spreadsheets that encompass formatting, formulae and charts. They tend to be personally responsible for designing and working with spreadsheets under minimal supervision.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Select and prepare resources	1.1. Adhere to ***ergonomic***, ***work organisation and occupational health and safety requirements*** 1.2. Use energy and resource ***conservation techniques*** to minimise wastage 1.3. Identify spreadsheet task requirements in relation to data entry, storage, output and presentation
2. Plan spreadsheet design	2.1. Ensure ***spreadsheet design*** suits the purpose, audience and information requirements of the task 2.2. Ensure spreadsheet design enhances readability and appearance, and meets organisational and task requirements for style and layout 2.3. Use style sheets and ***automatic functions*** to ensure ***consistency of design and layout***
3. Create spreadsheet	3.1. Ensure ***data*** is entered, ***checked*** and amended to maintain consistency of design and layout, in accordance with organisational and task requirements 3.2. ***Format*** spreadsheet using ***software functions*** to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements 3.3. Ensure ***formulae*** are tested and used to confirm output meets task requirements, in consultation with

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ELEMENT	PERFORMANCE CRITERIA
	appropriate personnel as required 3.4. Use manuals, user documentation and online help to overcome problems with spreadsheet design and production
4. Produce simple charts	4.1. Select chart type and design that enables valid representation of numerical data, and meets organisational and task requirements 4.2. Create charts using appropriate data range in the spreadsheet 4.3. Modify chart type and layout using formatting features
5. Finalise spreadsheets	5.1. Preview, adjust and ***print*** spreadsheet and any accompanying charts, in accordance with task requirements 5.2. Ensure data input meets ***designated time lines*** and organisational requirements for speed and accuracy 5.3. ***Name and store spreadsheet*** in accordance with organisational requirements and exit the application without data loss/damage

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to clarify requirements of spreadsheet • editing and proofreading skills to check own work for accuracy against original • keyboarding skills to enter text and numerical data • literacy skills to read and understand organisational procedures, and to use basic models to produce a range of spreadsheets • mathematical and statistical skills to use spreadsheet functions such as sum, counts and averages.
Required knowledge
• formatting requirements of workplace documents • organisational guidelines on spreadsheet design and use • organisational requirements for ergonomic standards, work periods and breaks, and conservation techniques.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • designing spreadsheets that address a range of data and organisational requirements • using software functions, graphics and support materials to create spreadsheets • knowledge of formatting requirements of workplace documents.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to samples of data for inclusion in spreadsheets.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of energy and resource conservation techniques used to minimise wastage • demonstration of techniques • oral or written questioning to assess knowledge of spreadsheet software functions • review of spreadsheets produced.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other IT use units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position • lighting • noise minimisation • posture • screen position • workstation height and layout
Work organisation requirements may include:	• exercise breaks • mix of repetitive and other activities • rest periods
Occupational health and safety requirements may include:	• inspections • organisational procedures regarding incidents, accidents, fire and emergencies • workplace meetings • workplace safety procedures • other consultative activities
Conservation techniques may include:	• double-sided paper use • recycling used and shredded paper • re-using paper for rough drafts (observing confidentiality requirements) • utilising power-save options for equipment
Spreadsheet design may include:	• appropriateness to required tasks • basic analysis • charts • formatting and reformatting • formulae • functions • headers and footers • headings

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RANGE STATEMENT	
	• headings and labels • identification and parameters • import and export of data • labels • macros • multi-page documents • split screen operation
Automatic functions may include:	• auto date • auto correct • auto format • auto text • default settings • headers and footers • page numbering • styles • table headings
Consistency of design and layout may include:	• borders • bullet/number lists • captions • consistency with other business documents • page numbers • spacings • typeface styles and point size
Data may include:	• numbers • text
Checking data may include:	• accuracy of data • accuracy of formulae with calculator • ensuring instructions with regard to content and format have been followed • proofreading • spelling, electronically and manually
Formatting may include:	• alignment on page • efficiency of formulae • enhancements to format - borders, patterns and colours • enhancements to text • headers/footers • use of absolute and relative cell addresses • use of cell addresses in formulae

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RANGE STATEMENT	
Software functions may include:	• adding/deleting columns/rows • formatting cells • formatting text • headers/footers • sizing columns/rows • using macros • utilising shortcuts
Formulae may include:	• average • division • multiplication • percentage • subtraction • sum • combinations of above
Printing may include:	• charts • entire workbooks • selected data within a worksheet • worksheets
Designated time lines may include:	• organisational time line e.g. financial requirements • time line agreed with internal/external client • time line agreed with supervisor/person requiring spreadsheet
Naming and storing spreadsheet may include:	• authorised access • file naming conventions • filing locations • organisational policy for backing up files • organisational policy for filing hard copies of spreadsheets • security • storage in electronic folders/sub-folders • storage on CD-ROM, USB, tape back-up, server

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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BSBITU305A Conduct online transactions

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake a range of online transactions, including banking, buying and selling products and services. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts. They may exercise discretion and judgement using appropriate theoretical knowledge of conducting online transactions to provide technical advice and support to a team.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify and investigate online service provider	1.1. Undertake online research to identify ***suppliers*** of required ***products***/***services*** 1.2. Assess service provider ***confidentiality***, ***security*** and ***privacy*** facilities in accordance with individual and organisational requirements 1.3. Assess potential products/services for authenticity
2. Perform online transactions	2.1. Confirm organisational requirements for products/services to be obtained 2.2. Ensure authentication information is secured in accordance with organisational requirements 2.3. Use appropriate online functions to obtain required products/services 2.4. Report any difficulties in accessing or using online facilities to the service provider 2.5. Complete transaction and ensure that products/services are received in accordance with terms of online transaction
3. Maintain records of online transactions	3.1. Maintain records of transactions in accordance with organisational policy, procedures and level of authority 3.2. Compare organisational records with online records and deal with irregularities according to organisational policy and procedures

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ELEMENT	PERFORMANCE CRITERIA
4. Review online transactions	4.1. Review obtained products/services rendered to determine quality, timeliness and level of customer service in relation to advertised profile 4.2. Make recommendations regarding continued or future use of online service provider, as supported by transaction history

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to negotiate with online service provider/s.
- literacy skills to read and analyse information for its relevance and sufficiency, and to follow policies and procedures
- numeracy skills to work with and evaluate monetary figures
- technology skills to operate computer and software appropriate to transaction being performed.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety
- policies and procedures relating to use of the internet and online purchasing
- service provider requirements
- legal and ethical requirements relating to a range of online transactions.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the

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EVIDENCE GUIDE	
performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification and selection of appropriate services to meet defined needs • use of appropriate security considerations • knowledge of policies and procedures relating to the use of the internet and online purchasing.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of legal and ethical requirements relating to a range of online transactions • review of recommendations made regarding continued or future use of online service provider.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other information and communications technology units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different

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RANGE STATEMENT	
work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Suppliers may include:	• banks or other financial institutions • e-auction • e-brokerage service • e-mail • e-procurement service • e-shop • third party marketplace
Products*/*services may include:	• financial services • goods • insurance • loans • shares

Confidentiality*, *security and privacy may include:	• access to independent reviews of financial services such as:
	  • Australian Competition and Consumer Commission (ACCC)
	  • Financial Planning Association of Australia (FPA)
	• authentication services
	• disclaimers
	• firewall protection
	• jurisdiction
	• level of encryption
	• limit of liability
	• personal identification number (PIN)
	• physical site security of web server
	• receipting
	• terms and conditions of website use
	• use of 'cookies' - small files automatically downloaded from a web server to the computer of someone browsing a website - information stored in cookies can be accessed any time computer returns to the site
	• user name and password
	• warranties

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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BSBITU306A Design and produce business documents

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to design and produce various business documents and publications. It includes selecting and using a range of functions on a variety of computer applications. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who possess fundamental skills in computer operations and keyboarding. They may exercise discretion and judgement using appropriate theoretical knowledge of document design and production to provide technical advice and support to a team.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Select and prepare resources	1.1. Select and use appropriate ***technology*** and ***software*** applications to produce required ***business documents*** 1.2. Select layout and style of publication according to information and ***organisational requirements*** 1.3. Ensure document design is consistent with company and/or client requirements, using basic design principles 1.4. Discuss and clarify format and style with person requesting document/publication
2. Design document	2.1. Identify, open and generate files and records according to task and organisational requirements 2.2. Design document to ensure efficient entry of information and to maximise the presentation and appearance of information 2.3. Use a range of ***functions*** to ensure consistency of design and layout 2.4. Operate ***input devices*** within designated requirements
3. Produce document	3.1. Complete document production within designated time lines according to organisational requirements 3.2. Check document produced to ensure it meets task requirements for style and layout 3.3. Store document appropriately and save document to

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ELEMENT	PERFORMANCE CRITERIA
	avoid loss of data 3.4. Use manuals, training booklets and/or help-desks to overcome basic difficulties with document design and production
4. Finalise document	4.1. Proofread document for readability, accuracy and consistency in language, style and layout prior to final output 4.2. Make any modifications to document to meet requirements 4.3. ***Name*** and ***store*** document in accordance with organisational requirements and exit the application without data/loss damage 4.4. Print and present document according to requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- keyboarding and computer skills to complete a range of formatting and layout tasks
- literacy skills to read and understand a variety of texts; to prepare general information and papers according to target audience; and to edit and proofread documents to ensure clarity of meaning and conformity to organisational requirements
- numeracy skills to access and retrieve data
- problem-solving skills to determine document design and production processes.

Required knowledge

- appropriate technology for production requirements
- functions and features of contemporary computer applications
- organisational policies, plans and procedures
- organisational requirements for document design e.g. style guide.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • designing and producing a minimum of 3 completed business documents, using at least 2 software applications in the production of each document • using appropriate data storage options • knowledge of the functions and features of contemporary computer applications.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of style guides and organisational procedures.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of final printed documents • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of software applications.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • general administration units • other IT use units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Technology may include:	• computers • photocopiers • printers • scanners
Software may include:	• accounting packages • database packages • presentation packages • spreadsheet packages • word processing packages
Business documents may include:	• accounts statements • client databases • newsletters • project reviews • proposals • reports • web pages
Organisational requirements may include:	• budgets • correctly identifying and opening files • legal and organisational policies, guidelines and requirements • locating data • log-on procedures • manufacturers' guidelines • occupational health and safety policies, procedures and programs • quality assurance and/or procedures manuals • saving and closing files • security • storing data
Functions may include:	• alternating headers and footers • editing • merging documents

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RANGE STATEMENT	
	• spell checking • table formatting • using columns • using styles
Input devices may include:	• keyboard • mouse • numerical key pad • scanner
Naming documents may include:	• appropriate file type • authorised access • file names according to organisational procedure e.g. numbers rather than names • file names which are easily identifiable in relation to the content • file/directory names which identify the operator, author, section, date etc. • filing locations • organisational policy for backing up files • organisational policy for filing hard copies of documents • security
Storing documents may include:	• storage in directories and sub-directories • storage on CD-ROMs, disk drives or back-up systems • storing/filing hard copies of computer generated documents • storing/filing hard copies of incoming and outgoing facsimiles • storing/filing incoming and outgoing correspondence

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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BSBITU307A Develop keyboarding speed and accuracy

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop keyboard skills with speed and accuracy using touch typing techniques.

Application of the Unit

Application of the unit	This unit applies to individuals who work in a range of environments and are required to enter text and data with speed and accuracy. On successful completion of this unit, individuals must be assessed in accordance with the current version of AS 2708: 2001 and issued with a speed statement.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Use safe work practices	1.1. Adjust workspace, furniture and equipment to suit ***ergonomic requirements*** of the user 1.2. Ensure ***work organisation*** meets organisational and occupational health and safety (OHS) requirements for computer operation
2. Identify and develop keyboard skills	2.1. Identify and apply keyboard functions for both alpha or numeric keyboard functions 2.2. Apply ***touch typing technique*** to complete tasks 2.3. Develop ***speed and accuracy*** in accordance with workplace requirements for level of responsibility
3. Check accuracy	3.1. Proofread document carefully to identify errors 3.2. Amend document, ensure errors are corrected and complete a final accuracy check

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

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REQUIRED SKILLS AND KNOWLEDGE
• keyboarding skills to enter text and numerical data • literacy skills to read, proofread and edit documents • numeracy skills to collate and present data, graphs and annotated references.
Required knowledge

• key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  • privacy laws
  • copyright
  • OHS.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • producing word processed documents • typing with 98% accuracy assessed under test conditions in line with the current version of AS 2708:2001 Keyboarding speed tests • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to samples of word processed documents and organisational style guides • that it is in accordance with the current version of AS 2708:2001 Keyboarding speed tests, which specifies the test material, the equipment, the environment and how to conduct and score the test • that a speed statement be issued to individuals assessed as competent against the unit.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples

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EVIDENCE GUIDE	
	are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of outcomes of keyboarding speed tests • review of documents for accuracy • demonstration of techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • word processing units • other units that include requirements to enter text or numerical data.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position • lighting • noise minimisation • posture • screen position • workstation height and layout
Work organisation may include:	• exercise breaks • mix of repetitive and other activities • rest periods • visual display unit (VDU) eye testing

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RANGE STATEMENT	
Touch typing technique may vary according to:	• level of competency of operator • workplace requirements
Speed and accuracy must be:	• consistent with degree of experience of operator • relevant to level of responsibility

Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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BSBITU309A Produce desktop published documents

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to design and produce desktop published documents. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who work in a range of environments and require skills in desktop publishing. They may work as individuals providing administrative support within an enterprise, or may be technical or knowledge experts responsible for the production of their own documents.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare to produce desktop published documents	1.1. Use safe work practices including addressing ***ergonomic requirements*** and using ***work organisation strategies*** 1.2. Use ***energy and resource conservation techniques*** 1.3. Identify ***document*** purpose, audience and presentation requirements, and clarify with relevant personnel as required 1.4. Identify ***organisational and task requirements*** for desktop published documents to ensure consistency of style and image
2. Set up desktop published document	2.1. ***Design*** content ***structure and layout*** to ensure information and graphics are arranged according to related topics and logical sequences 2.2. Select appropriate formatting and create templates or master pages to ensure ***consistency of design and layout*** 2.3. Confirm layout with appropriate person
3. Create desktop published document	3.1. Prepare, format and enter required text 3.2. Import text from other applications and resolve any formatting issues 3.3. Scan or import graphics from other applications and resolve any formatting issues 3.4. Arrange text and graphics according to

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ELEMENT	PERFORMANCE CRITERIA
	organisational and task requirements
4. Finalise desktop published document	4.1. Review text for possible errors and omissions, and resolve any issues 4.2. Check page order, structure and linkages 4.3. Produce completed document in required format 4.4. ***Name and store*** text documents, in accordance with organisational requirements and exit the application without information loss/damage 4.5. Prepare text documents within ***designated time lines*** and organisational requirements for speed and accuracy 4.6. Use manuals, user documentation and online help to overcome problems with document design and production

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to clarify requirements of documents
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- editing and proofreading skills to check own work for accuracy against original
- keyboarding skills to enter text and numerical data
- literacy skills to read and understand the organisation's procedures and to use models or exemplars to produce a range of documents
- problem-solving skills to edit documents and to resolve issues of consistency of design.

Required knowledge

- energy and resource conservation techniques
- organisational requirements for ergonomics, work periods and breaks
- organisational style guides
- purposes, uses and functions of desktop publishing software
- styles and their effect on formatting, readability and appearance of document.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • knowledge of document design and layout principles • producing desktop published documents.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources in a workplace or simulated environment • access to samples of relevantworkplace desktop published documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of desktop published documents • demonstration of techniques • oral or written questioning to assess knowledge of desktop publishing software functions.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • general administration units • other IT use units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating

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RANGE STATEMENT	
conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position • lighting • noise minimisation • posture • screen position • workstation height and layout
Work organisation strategies may include:	• exercise breaks • mix of repetitive and other activities • rest periods
Energy and resource conservation techniques may include:	• double-sided paper use • recycling used and shredded paper • re-using paper for rough drafts (observing confidentiality requirements) • utilising power-save options for equipment
Documents may include:	• brochures • calendars • faxes • flyers • forms • mail merge documents, including labels • memos • multi-page letters • promotional material • reports • schedules • tables
Organisational and task requirements may include:	• company colour scheme • company logo • consistent corporate image • content restrictions • established guidelines and procedures for document production • house styles

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RANGE STATEMENT	
	• observing copyright legislation • organisation name, time, date, document title, filename or other fields in headers and footers • templates
Design may include:	• balance • diversity • relative positioning of graphics, headings and white space • simplicity • text flow • typography
Structure and layout may include:	• boxes • colour • columns • drawing • graphics • headings • letter and memo conventions • page layout • photographs • typeface • white space
Consistency of design and layout may include:	• annotated references • borders • bulleted and numbered lists • captions • consistency with other business documents • footnotes and endnotes • indentations • page numbers • spacings • font styles and point size
Naming and storing documents may include:	• authorised access • file and folder names which identify requirements such as the operator, author, section or date • filing locations • file names according to organisational procedure • file names which are easily identifiable in

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RANGE STATEMENT	
	relation to the content • organisational policy for backing up files storage in folders and sub-folders • organisational policy for filing hard copies of documents • security and password protection • storage on disk drives, USBs, CD-ROM, tape back-up to server
Designated time lines may include:	• time line agreed with internal or external client • time line agreed with supervisor or person requiring document • organisational time line e.g. deadline requirements

Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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BSBITU401A Design and develop complex text documents

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to design and develop business documents using complex technical features of word processing software. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who work in a range of business environments and are skilled in the creation of complex documents using word processing software. These skills may be applied in the provision of administrative support within an enterprise, or by technical/knowledge experts responsible for producing their own word processed documents.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare to produce word processed documents	1.1. Use safe work practices to ensure ***ergonomic***, ***work organisation***, ***energy and resource conservation requirements*** are addressed 1.2. Identify ***document*** purpose, audience and presentation requirements, and clarify with relevant personnel as required 1.3. Identify ***organisational requirements*** for text-based business documents to ensure consistency of style and image 1.4. Evaluate ***complex technical functions*** of the software for their usefulness in fulfilling the requirements of the task 1.5. Match document requirements with software functions to provide efficient production of documents
2. Design complex documents	2.1. ***Design*** document ***structure and layout*** to suit purpose, audience and information requirements of the task 2.2. Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Use complex software functions to enable efficient manipulation of information and other material, and ensure ***consistency of design and layout***
	2.4. Use manuals, user documentation and online help to overcome problems with document design and production
3. Add complex tables and other data	3.1. Insert a standard table into document, changing cells to meet information requirements
	3.2. ***Format rows and columns*** as required
	3.3. Insert images and ***other data***, ***formatting*** as required
4. Produce documents	4.1. Use complex operations in the development of documents, to achieve required results
	4.2. Preview, adjust and ***print*** documents in accordance with organisational and task requirements
	4.3. ***Name and store documents*** in accordance with organisational requirements and exit the application without information loss/damage
	4.4. Prepare documents within ***designated time lines*** and organisational requirements for speed and accuracy

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to clarify requirements of documents
- keyboarding skills to enter text and numerical data
- literacy skills to edit and proofread documents, creating documents with a complex, organised structure of linked paragraphs which use simple and complex syntactic structure
- numeracy skills to collate and present data, graphs and annotated referencesproblem-solving skills to use processes flexibly and interchangeably.

Required knowledge

- formatting styles and their effect on formatting, readability and appearance of documents
- organisational requirements for ergonomics, work periods and breaks, and conservation techniques

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REQUIRED SKILLS AND KNOWLEDGE
• organisational style guide.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • production of text documents using advanced software functions • application of document design principles.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of complex text documents and style guides.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documents with complex design • demonstration of techniques • oral or written questioning to assess knowledge of word processing software functions.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBWRT401AWrite complex documents.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position • lighting • noise minimisation • posture • screen position • workstation height and layout • equipment that is reasonably adjusted to meet personal needs, in appropriate circumstances
Work organisation requirements may include:	• exercise breaks • mix of repetitive and other activities • rest periods
Energy and resource conservation requirements may include:	• double-sided paper use • recycling used and shredded paper • re-using paper for rough drafts (observing confidentiality requirements) • using power-save options for equipment
Complex ***documents*** may include:	• call outs • captions • concordance files • different odd and even pages • document protection • drawing • forms with fields • hyperlinks • linked and/or embedded objects • long documents • mail merge data documents • master documents

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RANGE STATEMENT	
	• MS WordArt • multiple headers and footers • multiple sections • multiple users • primary mail merge documents • subdocuments • templates
Organisational requirements may include:	• company colour scheme • company logo • consistent corporate image • content restrictions • established guidelines and procedures for document production • house styles • observing copyright legislation • organisation name, time, date, document title, filename, etc. in header/footer • templates
Complex technical functions may include:	• alignment • data transfer • display features • embedding • exporting • fields • form fields • formulae • importing • index • linking • macros • merge criteria • page and section breaks • sort criteria • style sheets • table of contents • templates
Design choices may include:	• balance • diversity • relative positioning of graphics and headings • simplicity

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RANGE STATEMENT	
	• text flow • typography
Structure and layout may include:	• boxes • colour • columns • drawing • graphics • headings • letter and memo conventions • page layout • photographs • typeface • white space
Consistency of design and layout may include:	• annotated references • borders • bullet/number lists • captions • consistency with other business documents • footnotes/endnotes • indentations • page numbers • spacings • typeface styles and point size
Formatting rows and column may include:	• auto distribute • fills/shading • lines and borders • merge cells • sorting contents • split cell • text direction
Other data may include:	• clip art • data from other software applications • digital photographs • files • graphics • quotes • references • scanned photographs and logos • tables, graphs and charts

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RANGE STATEMENT	
Formatting of other data may include:	• colour • cropping • layout • position in relation to other text • size
Printing may include:	• print merge • print to file • to fit specific number of pages • with comments • with drawing objects • with field codes • with hidden text
Naming and storing documents may include:	• authorised access • file names according to organisational procedure e.g. numbers rather than names • file names which are easily identifiable in relation to the content • file/directory names which identify the operator, author, section, date etc. • filing locations • organisational policy for backing up files • organisational policy for filing hard copies of documents • security • storage in folders/sub-folders • storage on hard/floppy disk drives, CD-ROM, tape back-up
Designated time lines may include:	• time line agreed with internal/external client • time line agreed with supervisor/person requiring spreadsheet • organisational time line e.g. deadline requirements

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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BSBITU402A Develop and use complex spreadsheets

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to use spreadsheet software to complete business tasks and to produce complex documents. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who require skills in the creation of complex spreadsheets to store and retrieve data. They may work as individuals providing administrative support within an enterprise, or may be independently responsible for designing and working with spreadsheets relevant to their own work roles.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare to develop spreadsheet	1.1. Organise personal work environment in accordance with ***ergonomic requirements***
	1.2. Analyse task and determine specifications for spreadsheets
	1.3. Identify organisational and task requirements in relation to data entry, storage, output, reporting and presentation requirements
	1.4. Apply ***work organisation strategies*** and ***energy and resource conservation techniques*** to plan work activities
2. Develop a linked spreadsheet solution	2.1. Utilise ***spreadsheet design*** software ***functions*** and ***formulae*** to meet identified requirements
	2.2. Link spreadsheets in accordance with software procedures
	2.3. Format cells and use data attributes assigned with relative and/or absolute cell references, in accordance with the task specifications
	2.4. Test formulae to confirm output meets task requirements
3. Automate and standardise	3.1. Evaluate tasks to identify those where automation

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ELEMENT	PERFORMANCE CRITERIA
spreadsheet operation	would increase efficiency 3.2. Create, use and edit ***macros*** to fulfil the requirements of the task and automate spreadsheet operation 3.3. Develop, edit and use ***templates*** to ensure consistency of design and layout for forms and reports, in accordance with organisational requirements
4. Use spreadsheets	4.1. Enter, check and amend data in accordance with organisational and task requirements 4.2. ***Import and export*** data between compatible spreadsheets and adjust host documents, in accordance with software and system procedures 4.3. Use manuals, user documentation and online help to overcome problems with spreadsheet design and production 4.4. Preview, adjust and ***print*** spreadsheet in accordance with organisational and task requirements 4.5. ***Name and store spreadsheet*** in accordance with organisational requirements and exit the application without data loss or damage
5. Represent numerical data in graphic form	5.1. Determine style of ***graph*** to meet specified requirements and manipulate spreadsheet data if necessary to suit graph requirements 5.2. ***Create graphs*** with labels and titles from numerical data contained in a spreadsheet file 5.3. Save, view and print graph within designated time lines

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to interpret and evaluate the purposes and uses of various features of spreadsheets and to use a variety of strategies for planning and reviewing own work • proofreading and editing skills to check for accuracy and consistency of

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REQUIRED SKILLS AND KNOWLEDGE
information by consulting additional resources • numeracy skills to collate and present data, graphs and related references.
Required knowledge

• advanced functions of spreadsheet software applications
• impact of formatting and design on the presentation and readability of data
• key provisions of relevant legislation from all forms of government, standards and codes that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • occupational health and safety
• organisational policies and procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing complex spreadsheets • developing graphical representations of data contained in spreadsheets.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and software • access to samples of data for inclusion in spreadsheets.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

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EVIDENCE GUIDE	
	• review of authenticated documents from the workplace or training environment • demonstration of techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other information and communications technology units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position • lighting • noise minimisation • posture • screen position • workstation height and layout
Work organisation strategies may include:	• exercise breaks • mix of repetitive and other activities • rest periods
Energy and resource conservation techniques may include:	• double-sided paper use • recycling used and shredded paper • re-using paper for rough drafts (observing confidentiality requirements) • using power-save options for equipment

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RANGE STATEMENT	
Spreadsheet design may include:	• analysis • appropriateness • avoidance of blank rows and columns • embedding cell references in formulae • formulae • formatting and reformatting • functions • headers and footers • headings • headings and labels • identification and parameters • import and export of data • labels • linked formulae • multi-page documents • pivot tables • relative and absolute cell references • split screen operation
Functions may include:	• basic financial functions (if available) • date functions • logical functions (lookup, if, choose, true, false, conditions) • mathematical functions (square root, integer, absolute value, round) • simple nested functions • statistical functions (standard deviation, count, maximum, minimum)
Formulae may include:	• addition • average • comparison • division • exponentiation • multiplication • percentage • subtraction • combinations of above
Macros may include:	• printing sections of a spreadsheet
Templates may include:	• font types and sizes • forms

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RANGE STATEMENT	
	• headers and footers • headings • page formats • reports
Importing and exporting data may include:	• proofreading • reformatting • split screen (if available)
Printing may include:	• charts • entire workbooks • selected data within a worksheet • worksheets
Naming and storing spreadsheets may include:	• authorised access • file naming conventions • filing locations • organisational policy for backing up files • organisational policy for filing hard copies of spreadsheets • security • storage in folders and sub-folders • storage on disk drives, CD-ROM, USB, tape back-up, server
Graphs may include:	• bar • line • pie • scatter • stack • 3D
Creating graphs may include:	• data range • keys and legends • labels and titles • naming • sizing (if possible) • using graph menu • X and Y axis

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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BSBITU404A Produce complex desktop published documents

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to design and produce complex desktop published documents. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals employed in a range of work environments who require well developed skills in desktop publishing. They may be individuals providing administrative support within an enterprise, or others responsible for the production of their own documents.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare to produce desktop published documents	1.1. Use safe work practices including addressing ***ergonomic requirements*** and using ***work organisation strategies*** 1.2. Use ***energy and resource conservation techniques*** 1.3. Identify ***document purpose***, audience, presentation and ***final output*** requirements, and clarify with relevant personnel as required 1.4. Identify ***organisational and task requirements*** for desktop published documents to ensure consistency of style and image
2. Design desktop published documents	2.1. ***Design*** document to enhance readability and appearance, according to organisational and task requirements 2.2. Determine document type and assess production and design requirements 2.3. Set up and use master pages, templates and styles to ensure ***consistency of design and layout*** 2.4. Set up colour palettes according to organisational and task requirements
3. Create desktop published documents	3.1. Prepare, format and enter required text 3.2. Import text from other applications and resolve any formatting issues 3.3. Scan or import graphics from other applications and

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ELEMENT	PERFORMANCE CRITERIA
	resolve any formatting issues 3.4. Use ***complex software functions*** to arrange text and graphics on page, according to organisational and task requirements
4. Finalise desktop published documents	4.1. Ensure pages. and combined graphics and text are composed correctly, to suit organisational and task requirements 4.2. Check that numerical sequencing and laydown of document is correct, to meet binding and finishing requirements 4.3. Incorporate bleed allowance in margins and borders
5. Produce desktop published documents	5.1. Review text for possible errors and omissions, and resolve any issues 5.2. Produce completed document in line with required final output 5.3. ***Name and store text documents***, in accordance with organisational requirements and exit the application without information loss/damage 5.4. Prepare text documents within ***designated time lines*** and organisational requirements for speed and accuracy 5.5. Use manuals, user documentation and online help to overcome problems with document design and production

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to clarify requirements of documents
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- editing and proofreading skills to check own work for accuracy against original
- keyboarding skills to enter text and numerical data
- literacy skills to read and understand organisation's procedures and to use models or exemplars to produce a range of documents
- problem-solving skills to edit documents and to resolve issues of consistency of

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REQUIRED SKILLS AND KNOWLEDGE
design.
Required knowledge
• formatting styles and their effect on formatting, readability and appearance of documents • organisational requirements for ergonomics, work periods and breaks, and energy and resource conservation techniques • purposes, uses and functions of desktop publishing software • organisational style guide.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • applying document design and layout principles • producing complex desktop published documents.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to samples of desktop published documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • demonstration of techniques in a workplace or simulated environment • oral or written questioning to assess knowledge of desktop publishing software functions.
Guidance information for	Holistic assessment with other units relevant to the

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EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended, for example: • other information and communications technologyunits.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position • lighting • noise minimisation • posture • screen position • workstation height and layout
Work organisation strategies may include:	• exercise breaks • mix of repetitive and other activities • rest periods
Energy and resource conservation techniques may include:	• double-sided paper use • recycling used and shredded paper • re-using paper for rough drafts (observing confidentiality requirements) • utilising power-save options for equipment
Document purpose may include using:	• call outs • captions • concordance files • different odd and even pages • document protection • drawing

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RANGE STATEMENT	
	• forms with fields • hyperlinks • long documents • linked or embedded objects • mail merge data documents • master documents • MS WordArt • multiple headers and footers • multiple sections • multiple users • primary mail merge documents • subdocuments • templates
Final output may include:	• electronic publishing • printed document • professionally printed document • web services
Organisational and task requirements may include:	• company colour scheme • company logo • consistent corporate image • content restrictions • established guidelines and procedures for document production • house styles • master pages • observing copyright legislation • organisation name, time, date, document title, filename or other fields in headers or footers • sheet size • style sheets • templates
Design may include:	• balance • boxes • colour • columns • diversity • drawing • graphics • headings • letter and memo conventions

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RANGE STATEMENT	
	• page layout • photographs • relative positioning of graphics and headings • simplicity • text flow • typeface • typography • white space
Consistency of design may include:	• annotated references • borders • bullet/ number lists • captions • consistency with other business documents • footnotes and endnotes • indentations • kerning and leading • page numbers • spacings • typeface styles and point size
Complex software functions may include:	• data transfer • display features • embedding • exporting • fields • form fields • formulae • importing • index • linking • macros • merge criteria • sort criteria • table of contents • templates
Naming and storing text documents may include:	• authorised access • file or folder names which identify the operator, author, section, date • filing locations • file names according to organisational procedure

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RANGE STATEMENT	
	• file names which are easily identifiable in relation to the content • organisational policy for backing up files storage in folders and sub-folders • organisational policy for filing hard copies of documents • security and password protection • storage on disk drives, CD-ROM, USBs, tape or server back-up
Designated time lines may include:	• time line agreed with interna or external client • time line agreed with supervisor or person requiring document • organisational time line e.g. deadline requirements

Unit Sector(s)

Unit sector	

Competency field

Competency field	Information and Communications Technology - IT Use

Co-requisite units

Co-requisite units		

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BSBLED101A Plan skills development

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify and document current skills and to plan future skills development under the guidance of an appropriate adviser. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals developing basic skills and knowledge of career planning and skills development in preparation for working in a broad range of settings.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Seek advice on future career directions	1.1. Identify possible career directions in industry or organisation 1.2. Identify and prioritise personal work goals 1.3. Discuss future work/career directions with ***appropriate people*** and identify additional skills requirements 1.4. Take into account personal values and attitudes regarding work and business, in planning future work/career directions 1.5. Identify additional skills required and determine appropriate ***method/s*** to acquire these skills
2. Conduct self assessment of skills	2.1. Identify work, life and study ***experiences relating to business*** 2.2. Assess current skills, knowledge and attitudes against a ***checklist*** of ***relevant competencies*** 2.3. Discuss results of self-assessment with trainer or assessor 2.4. Identify further skills development needs
3. Prepare portfolio of evidence	3.1. Identify and discuss ***types of evidence*** required 3.2. Develop a clear understanding of the ***purpose of evidence*** 3.3. Collect examples of evidence for portfolio 3.4. Complete application for recognition of current

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ELEMENT	PERFORMANCE CRITERIA
	competency and/or ***personal resume*** with assistance from assessor

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy and communication skills to access information to identify career options and personal work goals, and to draft a portfolio of evidence • problem-solving skills to solve routine problems related to the workplace, under direct supervision • technology skills to use business equipment, under direction.
Required knowledge
• importance of skills development in career planning terms • sources of advice on career planning and skill development • types of evidence and ways of creating portfolios of evidence.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documentation of personal strengths and areas for future skill development • documentation of proposed career plan • evidence of current competencies • knowledge of the importance of skills development in career planning terms.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of resumes and career planning resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of prioritisation of personal work goals • analysis of responses to case studies and scenarios • observation of presentations • oral or written questioning to assess knowledge of types of evidence and ways of creating portfolios of evidence • review of documentation identifying further skills development needs • analysis of portfolio.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other learning and development units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Appropriate people may include	• assessors • colleagues • mentors

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RANGE STATEMENT	
	• supervisors • trainers
Method/s to acquire additional skills may include:	• attendance at workshop or demonstration • formal course participation • on-the-job coaching or mentoring • work experience
Experiences relating to business may include:	• family responsibilities • study including formal or informal learning • volunteer or recreational experience • work experience
Checklist may include:	• personal skills and attributes • practical skills • strengths and weaknesses
Relevant competencies may include:	• academic results • interpersonal skills • organisation skills • personal attributes • personal skills e.g. demonstrated leadership, team work • practical skills directly related to a workplace
Types of evidence may include:	• academic results including informal studies • personal interests and experiences • previous employment • recreational experiences • volunteer work • work experience
Purpose of evidence may include:	• assessment of current competencies • building a picture of personal attributes • documentation of competencies relevant to the workplace • identification of areas for further skill development • identification of strengths and weaknesses
Personal resume may include:	• contact details • education and extra curricular activities • past employment and/or volunteer work • personal attributes, skills, strengths • professional development i.e. formal or informal courses undertaken • work experience

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RANGE STATEMENT	
	• work related or personal references

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Learning and Development

Co-requisite units

Co-requisite units		

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BSBLED301A Undertake e-learning

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake learning using electronic and communication technologies. It relates to the identification of learning needs and opportunities and to the development of an e-learning plan. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	The unit focuses on learning undertaken with the use of electronic and communication technologies. It is particularly useful in situations requiring self-directed or self-managed approaches to learning.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify learning needs	1.1. Identify personal ***learning needs*** and skill gaps through self assessment 1.2. Self-assess ***learning factors*** related to e learning and identify any ***support*** required to optimise e learning outcomes 1.3. Identify and prioritise required outcomes from e learning in accordance with individual, team and organisational requirements
2. Identify e-learning opportunities	2.1. In consultation with management, assess the range of suitable ***e-learning opportunities*** in accordance with identified learning outcomes, available technology, time and budgetary requirements 2.2. Examine e learning content, materials and ***on-line methodology*** to determine their quality, applicability and acceptability to individual and organisational requirements 2.3. Determine ***blended training solutions*** in accordance with organisational requirements where e learning opportunities alone are insufficient to meet personal learning needs
3. Develop an e-learning plan	3.1. Negotiate the inclusion of agreed e learning opportunities and timeframes in learning plans in accordance with individual and organisational needs 3.2. Negotiate and include time required to access e

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ELEMENT	PERFORMANCE CRITERIA
	learning opportunities in learning plans 3.3. Prepare, and obtain management agreement for, learning plans and required resources 3.4. Negotiate with management for the recognition of competencies developed through e learning
4. Undertake e-learning	4.1. Agree re-negotiated workload and deadlines with management to provide for the allocation of e learning time in accordance with agreed e learning plan and budgetary requirements 4.2. Undertake e learning in accordance with e learning plan and ***manage contingencies*** when ***unforeseen circumstances*** arise 4.3. Manage the integration of work and learning in accordance with the e learning plan and organisational requirements
5. Review e-learning	5.1. Evaluate the e learning experience in terms of its applicability to individual learning style and individual / organisational satisfaction with the process and the outcomes 5.2. Consider the advantages and disadvantages of e learning and make recommendations regarding participation in future e learning where necessary 5.3. Review and adjust individual e learning plan in accordance with individual requirements and organisational needs

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills for negotiation with management • computer literacy to access e-learning • literacy skills to interpret information about e-learning opportunities • numeracy skills of complying with budgetary requirements • self assessment skills to identify skill gaps • self management skills to maintain motivation and seek assistance • time management skills

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge

• Internet / World Wide Web
• legal, ethical and security issues relating to e-learning
• organisational learning and development policy
• personal competency requirements
• relevant legislation, codes and national standards such as:
  • award and enterprise agreements
  • national, State/Territory legislative requirements especially in regard to Occupational Health and Safety
  • industry codes of practice
  • OECD International Guidelines for Consumer Protection in E-Commerce
  • copyright laws
  • anti-discrimination
  • defamation laws
  • privacy legislation
  • intellectual property, confidentiality requirements.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • integrated demonstration of all elements of competency and their performance criteria • negotiating with stakeholders to develop an e-learning plan that meets individual and organisational needs • successful contingency management • satisfactory e-learning outcomes for self and organisation.
Context of and specific resources for assessment	Assessment must ensure: • the learner and trainer have access to appropriate

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EVIDENCE GUIDE	
	documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of learning outcomes resulting from the application of e-learning and the development of options to address contingencies • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations on e-learning programs • review of learning plan and its development • oral or written questioning to assess knowledge of e-learning applications, self-assessment processes and evaluation techniques. Evidence should be collected over a period of time which is sufficient to include an appropriate range and variety of situations.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate III in Customer Contact.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Learning needs may include:	• application of new information • business processes • competencies to access e-learning • corporate values and culture

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RANGE STATEMENT	
	• development/update of existing skills and knowledge • new technology • new work practices
Learning factors may include:	• comfort with online technologies • cultural, language and educational background • language, literacy and numeracy • level of confidence or anxiety • physical ability / disability • preferred learning style • previous experience with e-learning
Required support may include:	• access to the internet from home • class-based / face-to-face • dedicated e-learning personal computer in a quiet location in the workplace • induction into e-learning • laptop computer • learning / assessment partners • online tutors • print-based materials • technical experts • workplace mentors
e-learning opportunities may include:	• discussion boards • e-mail • intranet • iPod • mobile phones • multi-media • PC based • video-conferencing • internet
Online methodology may include:	• adaptable to learner preferences and values • business simulations • choice of male or female 'mentor' • e-seminars, with experts talking on video about cutting edge developments • e-study: a blend of text, graphics and on-screen interactions • exploration of underlying issues • interaction with fellow e-students and

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RANGE STATEMENT	
	instructors in threaded discussions • interactive technologies • mentor discussion re choices made • personalised to user's learning style • scenarios • short (10 - 15 minute) segments • use of multimedia • user control of the action
Blended training solutions may include:	• e-learning and face-to-face training courses • e-learning and on-the-job training • e-learning and traditional distance education
Contingency management may include:	• re-negotiating dedicated e-learning time • re-negotiating timeframes • re-negotiating work deadlines • re-scheduling e-learning
Unforeseen circumstances may include:	• absent staff • changed work requirements • illness (self or others) • increased workload • urgent work

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Learning and Development

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBLED401A Develop teams and individuals

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to determine individual and team development needs and to facilitate the development of the workgroup. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of learning and development who apply their skills in addressing development needs to meet team objectives. They may have responsibility to provide guidance or to delegate aspects of tasks to others.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Determine development needs	1.1. Systematically identify and implement ***learning and development needs*** in line with ***organisational requirements*** 1.2. Ensure that a learning plan to meet individual and group training and development needs is collaboratively developed, agreed to and implemented 1.3. Encourage individuals to self-evaluate performance and identify areas for improvement 1.4. Collect ***feedback on performance*** of team members from relevant sources and compare with established team learning needs
2. Develop individuals and teams	2.1. Identify learning and development program goals and objectives, ensuring a match to the specific knowledge and skill requirements of competency standards relevant to the industry 2.2. Ensure that ***learning delivery methods*** are appropriate to the learning goals, the learning style of participants, and availability of ***equipment and resources*** 2.3. Provide workplace learning opportunities, and ***coaching and mentoring assistance*** to facilitate individual and team achievement of competencies 2.4. Create development opportunities that incorporates a

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ELEMENT	PERFORMANCE CRITERIA
	range of activities and support materials appropriate to the achievement of identified competencies 2.5. Identify and approve resources and time lines required for learning activities in accordance with organisational requirements
3. Monitor and evaluate workplace learning	3.1. Use feedback from individuals or teams to identify and implement improvements in future learning arrangements 3.2. Assess and record outcomes and performance of individuals/teams to determine the effectiveness of development programs and the extent of additional development support 3.3. Negotiate modifications to learning plans to improve the efficiency and effectiveness of learning 3.4. Document and maintain records and reports of competency according to organisational requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to receive and report on feedback, to maintain effective relationships and to manage conflict
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- leadership skills to gain trust and confidence of clients and colleagues
- literacy skills to read, write and understand a variety of texts; and to edit and proofread documents to ensure clarity of meaning, accuracy and consistency of information
- negotiation skills to achieve mutually acceptable outcomes
- technology skills to support effective communication and presentation.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles

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REQUIRED SKILLS AND KNOWLEDGE
• codes of practice • privacy laws • occupational health and safety (OHS) • facilitation techniques to encourage team development and improvement • organisational policies, plans and procedures • career paths and competency standards relevant to the industry.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying and implementing learning opportunities for others • giving and receiving feedback from team members to encourage participation in and effectiveness of team • creating learning plans to match skill needs • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of learning and development plans, policies and procedures • examples of documents relating to diversity policies and procedures.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios

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EVIDENCE GUIDE	
	• oral or written questioning to assess knowledge of career paths and competency standards relevant to the industry • review of records and reports of competency.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • management units • other learning and development units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Learning and development needs may include:	• career planning/development • coaching, mentoring and/or supervision • formal/informal learning programs • internal/external training provision • performance appraisals • personal study • recognition of current competence/skills recognition • work experience/exchange/opportunities • workplace skills assessment
Organisational requirements may include:	• access and equity principles and practices • anti-discrimination and related policy • business and performance plans • confidentiality and security requirements • defined resource parameters • ethical standards • goals, objectives, plans, systems and processes • legal and organisational policies, guidelines and requirements

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RANGE STATEMENT	
	• OHS policies, procedures and programs • quality and continuous improvement processes and standards • quality assurance and/or procedures manuals
Feedback on performance may include:	• formal/informal performance appraisals • obtaining feedback from clients • obtaining feedback from supervisors and colleagues • personal, reflective behaviour strategies • routine organisational methods for monitoring service delivery
Learning delivery methods may include:	• conference and seminar attendance • formal course participation • induction • involvement in professional networks • on-the-job coaching or mentoring • presentations/demonstrations • problem-solving • work experience
Equipment and resources may include:	• facilities • funding • guest speakers • technological tools and equipment • time • training equipment such as whiteboards and audio-visual equipment
Coaching and mentoring assistance may include:	• fair and ethical practice • non-discriminatory processes and activities • presenting and promoting a positive image of the collective group • problem-solving • providing encouragement • providing feedback to another team member • respecting the contribution of all participants and giving credit for achievements

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Learning and Development

Co-requisite units

Co-requisite units		

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BSBLED501A Develop a workplace learning environment

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to encourage and support the development of a learning environment in which work and learning come together. Particular emphasis is on the development of strategies to facilitate and promote learning, and to monitor and improve learning performance. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to managers. All managers have a prominent role in encouraging, supporting and facilitating the development of a learning environment in which work and learning come together. At this level work will normally be carried out within complex and diverse methods and procedures, which require the exercise of considerable discretion and judgement, using a range of problem solving and decision making strategies.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Create learning opportunities	1.1. Identify potential formal and informal ***learning opportunities*** 1.2. Identify ***learning needs*** of individuals in relation to the needs of the team and/or enterprise, and available learning opportunities 1.3. Develop and implement ***learning plans*** as an integral part of individual and team performance plans 1.4. Develop strategies to ensure that learning plans reflect the ***diversity of needs*** 1.5. Ensure organisational procedures maximise individual and team access to, and participation in, learning opportunities 1.6. Ensure effective liaison occurs with ***training and development specialists*** and contributes to learning opportunities which enhance individual, team and organisational performance

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ELEMENT	PERFORMANCE CRITERIA
2. Facilitate and promote learning	2.1. Develop strategies to ensure that workplace learning opportunities are used and that team members are encouraged to share their skills and knowledge to ***encourage a learning culture*** within the team 2.2. Implement organisational procedures to ensure workplace learning opportunities contribute to the development of appropriate workplace knowledge, skills and attitudes 2.3. Implement policies and procedures to encourage team members to assess their own competencies, and to identify their own learning and development needs 2.4. Share the benefits of learning with others in the team and organisation 2.5. Recognise workplace achievement by timely and appropriate recognition, feedback and rewards
3. Monitor and improve learning effectiveness	3.1. Use strategies to ensure that team and individual learning performance is monitored to determine the type and extent of any additional work-based support required, and any occupational health and safety (OHS) issues 3.2. Use feedback from individuals and teams to identify and introduce improvements in future learning arrangements 3.3. Make adjustments, negotiated with training and development specialists, for improvements to the efficiency and effectiveness of learning 3.4. Use processes to ensure that records and reports of competency are documented and maintained within the organisation's systems and procedures to inform future planning

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to: • deal with people openly and fairly

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REQUIRED SKILLS AND KNOWLEDGE
• encourage colleagues to share their knowledge and skills • gain the trust and confidence of colleagues • use consultation skills effectively • literacy skills to access and use workplace information • planning and organisational skills to facilitate, promote and monitor learning by: • developing learning plans • establishing a workplace which is conducive to learning • evaluating the effectiveness of learning • identifying learning needs • negotiating learning arrangements with training and development specialists • selecting and using work activities to create learning opportunities • using coaching and mentoring to support learning.
Required knowledge
• management of relationships to achieve a learning environment • principles and techniques involved in the management and organisation of: • adult learning • coaching and mentoring • consultation and communication • improvement strategies • leadership • learning environment and learning culture • monitoring and reviewing workplace learning • problem identification and resolution • record keeping and management methods • structured learning • work-based learning.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • methods for reviewing performance development needs and techniques for providing feedback on those needs • models for planning professional development • options available for professional development • knowledge of relationship management required to achieve a learning environment.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of the principles and techniques involved in the management and organisation of adult learning • review of the development and implementation of learning plans • evaluation of how workplace achievement is recognised • review of processes used to record and report competency.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Management.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Learning opportunities may include:	• structured learning activities conducted outside and within the workplace such as:
	  • accredited training through an independent organisation such as a state/territory OHS authority
	  • action learning
	  • short courses
	  • training through a Registered Training Organisation (RTO) leading to a nationally recognised Australian Qualifications Framework (AQF) qualification or Statement of Attainment
	  • workshops
	• workplace learning activities, that may also contribute to a recognised credential, such as:
	  • coaching
	  • exchange/rotation
	  • induction
	  • mentoring
	  • shadowing

Learning needs may include:	• developmental learning, for example the learning required to progress through an organisation and take on new tasks and roles • gaps between the competencies held by the employee, and the skills and knowledge required to effectively undertake workplace tasks
Learning plans may include:	• codes of conduct • key performance indicators • negotiated agreement with individual/s • OHS requirements • performance standards • team competencies • team roles and responsibilities • work outputs and processes

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RANGE STATEMENT	
Diversity of needs may include:	• learning needs that relate to social, cultural and other types of workplace diversity, such as the need for varied communication styles and approaches
Training and development specialists may be:	• internal • external
Encourage a learning culture may refer to:	• encouraging learning and sharing skills and knowledge across the work team and the wider organisation to develop competencies of individual team members and the team as a whole

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBLED502A Manage programs that promote personal effectiveness

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage programs within a health and wellbeing focus. The unit addresses the management of the range of programs that would typically be associated with health and wellbeing such as stress management, smoking cessation, exercise, Employee Assistance Programs (EAPs). No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to human resources managers, human resources personnel or other managers who take responsibility for managing staff health and wellbeing program/s or activities. It has particular relevance for managers of human resources or diversity programs, frontline managers and specialist consultants responsible for promoting a balance between work demands and personal life. It is not assumed that the manager will be directly involved in delivering the program/s.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Research and analyse employee health issues	1.1. Identify and collect information on ***employee health issues*** from appropriate internal and external sources 1.2. Review findings and their implications for the organisation and ***business objectives*** 1.3. Develop ***options*** for addressing identified health issues 1.4. Obtain support from senior managers for preferred option/s
2. Plan health and	2.1. Develop program/s scope and objectives in

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ELEMENT	PERFORMANCE CRITERIA
wellbeing program/s	consultation with appropriate industry consultants, colleagues and managers 2.2. Plan and create administrative structure and resources for the program/s 2.3. Establish program responsibilities and clearly communicate to all ***stakeholders*** 2.4. Plan communications and marketing strategies in conjunction with stakeholders 2.5. Establish suitable evaluation methods, develop an overall ***program management plan*** and communicate this plan to stakeholders
3. Implement, administer and monitor program/s	3.1. Prepare policy documents, and implement and monitor strategies in conjunction with program team members 3.2. Provide appropriate support, assistance and mentors to relevant personnel 3.3. Implement and monitor tracking systems according to program guidelines 3.4. Reach program milestones within agreed time lines and provide regular progress reports to stakeholders
4. Evaluate program/s	4.1. Use agreed ***evaluation methods*** to assess the effectiveness of the program at specific stages 4.2. Communicate information from program evaluation process to stakeholders 4.3. Incorporate evaluation process and outcomes into continuous improvement strategies, enterprise agreements and future corporate plans

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• planning and organising skills to schedule and monitor activities • research and analysis skills to explore employee health issues and to review data to determine whether employee health initiatives are meeting their objective.
Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE
• range of employee health issues and options for improving health outcomes • employee health program design and evaluation techniques.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • research on employee health issues and a plan to improve employee health in one or more areas • techniques for monitoring an employee health program and evaluating its effectiveness • knowledge of a range of employee health issues and options for improving health outcomes.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on employee health issues and options to address health issues of concern • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations on employee health programs • review of documentation aligning strategies with corporate goals, mission statements and directions • review of program management plan and how it was communicated to stakeholders • evaluation of progress reports to stakeholders • oral or written questioning to assess knowledge of employee health program design and evaluation

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EVIDENCE GUIDE	
	techniques.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Human Resources Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Employee health issues may include:	• alcohol or other drug use • diet and obesity • lifestyle related diseases, such as diabetes • mental health, including depression and anxiety • obesity • physical fitness • smoking • stress
Business objectives may include:	• becoming an employer of choice • improving productivity • reducing illness and absenteeism • triple bottom line
Options may include:	• changing canteen offerings • conducting information or awareness-raising programs • developing policies on health food, stress management or other health issues • EAPs • offering more flexibility in working hours or leave arrangements • offering training or skills development programs

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RANGE STATEMENT	
	• subsidising exercise programs, gym membership or smoking cessation
Stakeholders may include:	• colleagues, team members or other staff members • owners/management/financial backers
Program management plan will normally include:	• additional resource requirements (including technology) • cost benefit analysis and contingency plans • key program milestones • strategies to assess, review and communicate progress against program goals • strategies to obtain management approval for program plan
Evaluation methods may include:	• collection of qualitative data • collection of quantitative data • cost benefit analysis • feedback from consultants or staff delivering program/s • interviews • mapping against agreed goals and priorities

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Learning and Development

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBLED503A Maintain and enhance professional practice

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required by individuals to manage their own professional development and ongoing performance. This unit addresses the process required to maintain a high level of professional performance in a particular field. It includes modelling high standards of performance according to professional standards and procedures, and the processes and outcomes involved in determining professional development needs and participating in associated activities. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who are required to maintain and manage their professional development at a high standard. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Model high standards of performance	1.1. Ensure personal performance is consistent with the ***organisation's goals and objectives*** 1.2. Ensure work goals and plans reflect individual responsibilities in accordance with ***organisational and legal requirements***
2. Determine personal development needs	2.1. Assess personal skills and knowledge against relevant benchmarks to determine development needs and priorities 2.2. Identify changes in professional practices and codes of conduct 2.3. Use ***feedback*** from colleagues and clients to identify personal learning needs and areas of professional development 2.4. Identify future career options

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ELEMENT	PERFORMANCE CRITERIA
	2.5. Update and document personal learning needs 2.6. Discuss personal development needs with ***relevant personnel*** for inclusion in ***professional development plan***
3. Participate in professional development activities	3.1. Select ***development opportunities*** suitable to personal learning styles to support continuous learning and maintain currency of professional practice 3.2. Participate in ***professional networks*** to support continuous learning and to maintain professional practice 3.3. Use technology to maintain regular communication with relevant networks, organisations and individuals
4. Reflect on and evaluate professional practice	4.1. Research ***developments and trends*** impacting on professional practice and integrate them into work performance 4.2. Use feedback from colleagues, supervisors, staff and clients to identify and introduce improvements in work performance 4.3. Identify innovative and responsive approaches for improving professional practice through the use of ***continuous improvement techniques and processes*** 4.4. Track progress through a personal portfolio or other mechanism 4.5. Manage records, reports and recommendations for improvement

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- self-management skills to:
  - systematically evaluate personal work practices to improve performance or understanding
  - identify gaps in skills or knowledge
  - obtain competencies or capabilities to meet current and future organisational

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REQUIRED SKILLS AND KNOWLEDGE

objectives
- research skills to:
  - keep up with trends in professional development in current and future roles
  - identify relevant industry affiliations
- communication skills to:
  - obtain feedback from colleagues and clients
  - participate in professional networks
- interpersonal skills to:
  - participate in industry events and activities
  - build professional relationships
  - build an industry network
  - participate in communities of practice
- literacy skills to:
  - document personal learning needs
  - read and interpret information, such as legal and organisational policy documents
  - complete and maintain records relating to professional development
- time-management skills to:
  - organise professional development activities
  - analyse and identify career options

Required knowledge

- organisational goals and objectives
- organisational processes, procedures and opportunities relating to professional development
- range of continuous improvement techniques and processes, and their application
- social and education trends and changes impacting on legal practices and legal profession
- networks relevant to professional practice
- ethical and inclusive standards, principles and practices
- types and availability of training development activities and opportunities
- relevant policies, legislation, codes of practice and national standards, including commonwealth, state or territory legislation, for example:
  - industry and workplace requirements
  - duty of care under common law
- recording information and confidentiality requirements
- anti-discrimination, including equal opportunity, racial vilification and disability discrimination
- workplace relations
- industrial awards and enterprise agreements

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REQUIRED SKILLS AND KNOWLEDGE
• relevant OHS knowledge relating to work role and work context, and OHS when managing own professional practice and performance

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • document personal learning needs • research networks, developments and trends • apply continuous improvement techniques and processes • reflect on own professional practice • obtain feedback from clients and colleagues • identify and address professional development needs.
Context of and specific resources for assessment	Assessment must ensure access to: • relevant organisational and legal documentation • networks, technology and modes of communication • contemporary information on professional development and career planning relevant to occupation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • professional development portfolio and/or self-reflection journal maintained over a period of time • case studies • evidence of networking and using technology to gain information and other support • evidence of feedback from colleagues and clients on professional practice.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Organisation's goals and objectives may relate to:	• business plan • client satisfaction • financial performance • flexibility and client responsiveness • marketing and client service • operational plan • organisation's code of conduct • people management • quality and quality assurance • strategic plan.

Organisational and legal requirements may include:	• administrative and records management system, for example:
	  • document version control
	  • maintenance, retention, archiving, retrieval, storage and security of assessment information
	  • reporting and recording requirements and arrangements
	• access and equity
	• availability of policies and procedures
	• client selection, enrolment and induction/orientation
	• collaborative and partnership arrangements
	• confidentiality and privacy requirements
	• customer complaints, grievances and appeals
	• defined resource parameters
	• ethical standards
	• financial management, including refund policies and systems to protect fees paid in advance (ifÂ appropriate)
	• recognition of qualifications issued by other training and/or assessment organisations
	• risk identification and management, including OHS quality and continuous improvement processes and standards, such as validation systems
	• staff recruitment, induction and ongoing development

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RANGE STATEMENT	
	and monitoring.
Feedback may include:	• comments from clients • comments from supervisors and colleagues • formal and informal performance appraisals • personal reflective behaviour strategies • routine organisational methods for monitoring service delivery.
Relevant personnel may include:	• career development professional • coach • human resource personnel • mentor • supervisor.

Professional development plan refers to:	• organisation's professional development plan for each individual staff member, outlining:
	  • work and personal career objectives
	  • identified areas requiring development
	  • learning opportunities and activities
	  • relevant work activities and projects
	  • links to organisational training needs profile.

Development opportunities may include:	• attending relevant conferences, seminars and workshops • coaching and mentoring • internal training and development programs • networking with internal and external colleagues • reading relevant journals and literature • undertaking higher education or further VET qualifications • undertaking professional development in specific areas of practice.

Professional networks may include:	• informal networks, such as:
	  • contacts in vocational education and training
	  • other employees in the same or different organisation
	  • people working in industry or vocational area
	• formal networks, such as:
	  • communities of practice
	  • interest and support groups, e.g. alumni groups
	  • professional and occupation associations
	  • regional, specialist and peak associations.

Developments and	• legislative and regulatory changes affecting legal

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RANGE STATEMENT	
trends may include:	practices • new developments, directions and trends affecting job role • new or revised Training Packages in vocational area of expertise • policy changes in the legal profession.
Continuous improvement techniques and processes may include:	• limited and systemic evaluation • ongoing education and training • review and maintenance of records • self-assessment • strategic business and operational planning • team meetings and networking.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Leadership

Co-requisite units

Co-requisite units		

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BSBLED701A Lead personal and strategic transformation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to analyse and improve personal leadership style and professional competence, and to lead organisational transformation and learning for strategic outcomes. The unit also covers leading transformational practices, cultivating collaborative practices, completing ongoing professional development, and providing strategic leadership in a dynamic context. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to leaders or managers working in organisations where learning is used to build capabilities. Their effectiveness is based on professional expertise and personal integrity, and they provide a role model for others. The unit may relate to learning activities within a small to medium sized organisation or a significant unit of activity in a large organisation. Leaders in learning must be able to respond strategically, acting as transformational agents in response to multiple drivers for change - they seek to improve competitive advantage through transformation of individual, team and operational capabilities.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Reflect on personal efficacy	1.1. Identify and apply strategies to create a climate that encourages and allows for the receiving and giving of effective feedback 1.2. Regularly review ***personal efficacy***, ***personal competence***, and attainment of professional competence outcomes and personal development objectives and priorities 1.3. Review capacity as a role model in terms of ability to build trust, confidence and respect of diverse groups and ***relevant individuals***

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ELEMENT	PERFORMANCE CRITERIA
	1.4. Evaluate personal efficacy and ability to build an effective organisational and workplace culture 1.5. Analyse and evaluate personal effectiveness in developing the competence required to achieve operational ***accountabilities and responsibilities***
2. Lead in a transformational manner	2.1. Apply transformational and transactional leadership practices in a given context 2.2. Demonstrate empathy in personal communication relationships and day-to-day leadership role 2.3. Lead consistently, in an inclusive manner that is respectful of individual differences 2.4. ***Control and appropriately regulate*** own potentially disruptive emotions and impulses 2.5. Manage work-based relationships effectively 2.6. Integrate emotions with ***cognitions*** in personal ***leadership style*** 2.7. Evaluate personal leadership style and apply to a given context
3. Model and cultivate collaborative thinking	3.1. Display judgement, ***intelligence*** and commonsense when undertaking day-to-day leadership role 3.2. Analyse relevant legislation, information and intelligence sources when evaluating business opportunities 3.3. Draw upon personal expertise of self and relevant individuals to achieve strategic results 3.4. Seek and encourage contributions from relevant individuals 3.5. Use collaborative communication and learning approaches to model and encourage such practices in the workplace 3.6. Cultivate existing and new, collaborative and participative work relationships
4. Provide strategic leadership during change processes	4.1. Convey organisational direction and values positively to relevant individuals and ***relevant stakeholders*** 4.2. Analyse impact and role of leadership during organisational change 4.3. Analyse and confirm capacity and competence of relevant individuals consistent with their ability to contribute to change processes and plans 4.4. Develop learning and communication solutions to

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ELEMENT	PERFORMANCE CRITERIA
	address problems and ***risks*** arising for individuals during organisational change 4.5. Identify leadership styles and develop approaches to best respond to the impact of change on people and processes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills

• problem-solving, initiative and enterprise skills to:
  • direct, motivate, consult and delegate appropriate to the circumstances
  • collect, analyse and interpret data using a range of methods
  • shape strategic thinking and inspire others through a shared vision
  • work with teams with diverse emotional and multiple intelligences and thinking (cognition) skills
• teamwork skills to lead a team, workgroup or unit, being aware of employee needs and requirements
• self-management skills to:
  • provide leadership in occupational health and safety (OHS) practice, ethical standards, legislative requirements and corporate governance
  • review own personal and professional competence against personal development objectives
  • support and use participative arrangements aimed at establishing trust
• communication skills to:
  • maintain appropriate relationships with colleagues and others
  • value and be open to, the opinions of others
  • work as part of a team
  • model collaborative communication and learning
  • use active listening and negotiation skills
  • encourage participation across all levels of personnel and clients
  • seek opinions and elicit feedback from a range of stakeholders
  • develop written texts which deal with complex ideas and concepts
• technology skills to use office computer applications

Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE
• relevant legislation that affects the business operation, especially in regard to OHS and environmental issues, equal opportunity and anti-discrimination, industrial relations • organisation mission, purpose and values • organisation objectives, plans and strategies • leadership styles • personal development planning methodologies • data collection methods • external environment scanning relating to social, political, economic and technological developments • emotional intelligence and its relationship to individual and team effectiveness • organisational transformation and the management of the stages of change • organisational design and building in responsiveness of operations to change in customer or market conditions

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • capacity to improve own development, personal leadership style and self-management skills • demonstrated application of leadership style and approach appropriate to individuals involved, outcomes being sought and context • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • competence is consistently demonstrated over time, and over a range and variety of complex tasks/projects and situations • access to appropriate documentation and resources normally used in the workplacesuch as

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EVIDENCE GUIDE	
	organisational policies and procedures, relevant legislation • access to clients.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of applied projects and learning activities such as reports and case studies • direct observation of contextual application and presentations to a range of stakeholders • oral or written questioning to assess knowledge of leadership styles • analysis of personal reflection and self-awareness of leadership styles and impact of this approach on task completion and others • review of personal development plan.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBINN501A Establish systems that support innovation • BSBINN601B Manage organisational change • BSBINN801A Lead innovative thinking and practice • BSBLED702A Lead learning strategy implementation • PSPHR616A Manage performance management system.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work

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RANGE STATEMENT	
situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Personal efficacy may include:	• accurately reflecting and performing self-assessment • having self-confidence • recognising personal emotional responses in a given context.
Personal competence may include:	• accessibility • adaptability to change • decisiveness • flexibility • personal performance appraisal • self-analysis.
Relevant individuals may include:	• employees, staff • employers • government agencies and departments • industry associations and employer bodies • industry representatives • national Industry Skills Councils • professional associations • regulatory, licensing and compliance authorities • research agencies • students • state and territory industry training advisory bodies • subject or technical specialists and experts • trade unions • universities.
Accountabilities and responsibilities may include:	• clarifying who is to be accountable for a decision or action prior to its execution • identifying groups, individuals and activities for which a person is responsible for managing.
Controlling and appropriately regulating disruptive emotions and impulses may include:	• avoiding personal responses that may be insensitive or inappropriate in a given context • managing disruptive emotions and impulses • positively shaping interpersonal relationships • self-control.
Cognitions may include:	• thinking through personal and other team

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RANGE STATEMENT	
	member's responses to given situations • thinking through problems and plans.
Leadership style will usually be differentiated by five classical approaches:	• autocratic (non-participative) • charismatic flexibility • democratic (participative) • laissez faire (free reign) • paternalistic.
Intelligence refers to:	• emotional and decision making intelligence.
Relevant stakeholders may include:	• administrative and regulatory bodies • coordinators, teachers, assessors, coaches, mentors and support staff • experts • industry, employees, employer, professional and peak bodies or associations • other employers • public or private sector enterprises • students • suppliers and business partners • training and assessment organisation.
Risks may include:	• issues, concerns or actions likely to result in a negative outcome, for example preventing the organisation to meet its objectives • likely consequences of such an event on organisational performance and business continuity management.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Learning and Development

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Co-requisite units

Co-requisite units		

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BSBLED702A Lead learning strategy implementation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide professional leadership in improving organisational learning, and the quality of training and assessment products and services. The unit also covers leading strategy formation; designing, developing and implementing an organisational learning strategy; and reviewing and improving overall organisational learning and development. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to senior leaders or managers working in an enterprise where learning is used to build capabilities. The unit may relate to leadership of a small to medium sized organisation or a significant unit of activity in a large organisation. Effective leadership requires the professional respect of colleagues, contacts, clients and the community. When applied to the development of organisational learning strategies this involves contributing to organisational strategies, business plans, goals, values and the bottom line by providing learning related services either directly, through partnerships or by using external providers. Learning leaders must be able to collaboratively implement relevant organisational strategies to ensure learning has a strategic role among the ever changing context and complex influences that affect learners, employees, and business and learning processes.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Provide leadership to learning strategy formation	1.1. Evaluate approaches to learning and workplace training against ***organisational strategic requirements***
	1.2. Analyse and confirm with ***key stakeholders*** the contribution of organisational learning to competitiveness
	1.3. Examine and review options relating to deploying

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ELEMENT	PERFORMANCE CRITERIA
	quality policies and processes in organisational learning 1.4. Analyse and plan requirements for an ***organisational learning strategy*** to support organisational strategic and policy requirements 1.5. Analyse and plan ***technological and systems requirements*** relating to an organisational learning strategy 1.6. Analyse and align organisational learning strategy with ***human resources and learning requirements*** and plans
2. Design and develop organisational learning strategy	2.1. Design organisational learning strategy to achieve instructor, learner and organisational strategic requirements 2.2. Include relevant units of competency, modules from ***accredited courses*** or non-accredited training specifications in organisational learning strategy 2.3. Develop flexible organisational learning strategies to permit and promote responsiveness of the organisation to changed circumstances and priorities 2.4. Design and develop learning and assessment strategies to support organisational strategic requirements 2.5. Establish processes and procedures for allocating and managing resources and staff, required to implement organisational learning strategy 2.6. Structure compliant assessment and recognition policies and processes appropriate to organisational strategic requirements 2.7. Structure procurement and supply policies and processes appropriate to organisational strategic requirements
3. Implement organisational learning strategy	3.1. Implement organisational learning strategy appropriate to organisational requirements 3.2. Validate organisational ***assessment methods*** and ***assessment tools*** consistent with learning and ***wider operational needs*** 3.3. Source ***learning resources*** compliant with specific international, national, industry and workplace needs 3.4. Review policies and procedures for continuing relevance, operational effectiveness and to identify any gaps

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ELEMENT	PERFORMANCE CRITERIA
	3.5. Systematically evaluate strategic outcomes attained through organisational learning strategy and update policies and procedures accordingly
4. Review organisational learning and development	4.1. Develop procedures to systematically liaise with educators, learners and others to monitor how well learning strategies and learning resources achieve organisational learning targets 4.2. Monitor and incorporate national policy and system changes into organisational learning and development strategies and practices 4.3. Modify or design learning strategies and learning resources to support the implementation of improved learning policies and procedures
5. Improve organisational learning strategy formation	5.1. Evaluate ***end-to-end implementation*** of organisational learning strategy 5.2. Review performance of resources and people supporting organisational learning strategy implementation 5.3. Construct and present plans for improving organisational learning strategy formation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and teamwork skills to:
  - communicate ideas, policies and procedures of an organisation
  - encourage participation across all levels of personnel and clients
  - seek opinions and elicit feedback from a range of stakeholders
- planning and organising skills to:
  - develop, implement and review organisational learning strategy
  - establish rules and procedures to ensure the effective implementation of organisational learning strategy
  - allocate and assess performance of resources relating to organisational learning strategy
- problem-solving, initiative and enterprise skills to:

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REQUIRED SKILLS AND KNOWLEDGE
• complete research and analyse findings • research and analyse organisational learning theory and procedures • strategically evaluate outcomes of an organisational learning strategy • design and create systems and processes to support learning • self-management and learning skills to: • evaluate personal effectiveness and professional competence • lead the way in occupational health and safety (OHS) practice, ethical standards, legislative requirements and corporate governance.
Required knowledge
• authoritative responsibilities and parameters within the organisation • consultation and communication processes to support and encourage organisational input into polices and procedures development processes • contemporary approaches to assessment instrument and strategy design • contemporary organisational learning strategy design and development • continuous improvement processes associated with organisational learning strategy • implementation processes and their impact on an organisation • locations, types and sources of relevant organisational documentation • organisational evaluation strategies • organisational learning theory • quality management compliance requirements as it relates to organisational learning • range of international e-learning compliance regimes • relevant authority compliance requirements and obligations, for example under the Australian Quality Training Framework (AQTF) Standards for Registered Training Organisations (where applicable) • relevant policy, legislation, codes of practice and national standards including commonwealth and state/territory legislation as it relates to the job role • technology and systems requirements to support an organisational learning strategy.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated capacity to research and evaluate models and approaches to organisational learning • developing consultation and communication processes to support and encourage personnel input into design, implementation and review of organisational learning strategy • initiating and implementing learning program partnerships in line with relevant regulatory, employment and organisational requirements • sourcing, and if required modifying, learning resources or assessment tools to meet the requirements of organisational learning strategies • knowledge of relevant authority compliance requirements and obligations.
Context of and specific resources for assessment	Assessment must ensure: • competence is consistently demonstrated over time, and over a range and variety of complex tasks/projects and situations • access to required assessment facilities and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of applied projects or learning activities, such as planning and implementing training and assessment, designing organisation's approach to training and assessment services, reviewing AQTF compliance and integration with organisational systems and learning frameworks, learning system compliance, and policy development and review • observation of contextual application of knowledge and skills • oral or written questioning to assess knowledge of organisational learning theory.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBINN801A Lead innovative thinking and practice

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EVIDENCE GUIDE	
	• BSBLED701A Lead personal and strategic transformation • BSBLED704A Review enterprise e-learning systems and solutions implementation • BSBLED710A Develop human capital • BSBREL701A Develop and cultivate collaborative partnerships and relationships • PSPHR616A Manage performance management system • PSPMNGT614A Facilitate knowledge management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Organisational strategic requirements may include:	• access and equity principles and practices • available technology and learning systems • business and performance plans • collaborative or partnership arrangements • confidentiality requirements • defined resource parameters • efficiency and effectiveness of supply arrangements with third party suppliers (i.e. procurement arrangements) • ethical standards • existing technology and systems in place to manage performance, customer service, decision support, suppliers, learning, compliance and related activities • goals, objectives, plans, systems and processes at corporate, strategic, operational and other levels of planning • legal and organisational policies, guidelines and requirements • OHS policies, procedures and programs

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RANGE STATEMENT	
	• quality and continuous improvement processes and standards • quality assurance and procedures manuals • recording and reporting procedures
Key stakeholders may include:	• customers • learners • instructional designers • instructors • management and staff • peers • public • public agencies, especially regulators • suppliers and learning partners
Organisational learning strategy may include:	• identification of personnel responsible for the implementation of the organisational learning strategy • integrated strategic activity or multiple related activities or strategies being conducted for one defined organisation or entity • mechanisms for involving personnel in the decision making and implementation • mechanisms for the introduction of new or modified policies and procedures for an organisation or client • mechanisms to facilitate continuous improvement processes • quality procedures or workflow associated with implementation of learning and assessment strategies
Technological and systems requirements may include:	• authoring tools • learning environments • learning management systems • mode and format of content developed by the organisation and its suppliers • mode of teaching (mix of face-to-face and online, blended, computer-based learning, distance) • networks and bandwidth • numbers of users, including concurrent system users • storage and presentation systems including learning content management systems and

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RANGE STATEMENT	
	learning object repositories
Human resources and learning requirements may include:	• consistency in training and/or assessment services provided • framework for consultation processes with industry for development of training and/or assessment services • framework under which the provision of training and/or assessment services is conducted • identification of roles and responsibilities of key personnel in an organisation • mechanisms to facilitate continuous improvement within the training and/or assessment organisation • transparency of the training and/or assessment organisation's approach to training and/or assessment services
Accredited courses may include:	• courses accredited by a state/territory course accrediting body, which meet the requirements of the AQTF Guidelines for Course Developers • courses resulting in credentials issued by a recognised higher education institution
Compliant learning resources and systems in the context of organisational learning strategy development my include:	• accessibility and diversity needs (i.e. W3C) • AQTF Standards for Registered Training Organisations • content storage, discovery, management and access standards and reference models (i.e. ADL Registry, CORDRA, S1000D) • international e-learning standards, specifications and reference models (i.e. SCORM, IEEE, IMS, AICC) • industry standards/benchmarks • OHS requirements • training and/or assessment organisation standards
Assessment methods may include:	• analysing portfolios and evidence compiled by the candidate • questioning (for example, computer, oral and written questions) • real work, real time activities (for example, direct observation and third party reports) • reviewing evidence regarding recognition of

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RANGE STATEMENT	
	current competence/skills recognition • structured activities (for example, simulation exercises, demonstration and activity sheets)

Assessment tools may include:	• instruments for recording summative assessment outcomes against the requirements of a unit of competency
	• procedures, information and instructions for the assessor or candidate on use of assessment instruments and assessment conditions
	• tools for use in assessments such as:
	  • evidence or observation checklists
	  • templates, proformas
	  • profile of acceptable performance measures
	  • specific questions or activities
	  • checklists for the evaluation of work samples
	  • candidate self-assessment materials

Wider operational needs may include:	• managing assessment and reporting of outcomes relating to:
	  • compliance
	  • human capital
	  • knowledge
	  • performance
	  • service standards
	  • talent

Learning resources may include:	• learning resources and learning materials developed under the Workplace English Language and Literacy (WELL) program
	• manuals
	• organisational learning resources
	• published, commercially available support materials for Training Packages or accredited courses
	• record or log books
	• references and texts
	• National Quality Council 'noted' Training Package support materials such as:
	  • learner or user guides
	  • trainer and facilitator guides
	  • example training programs

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RANGE STATEMENT	
	• case studies • professional development materials • assessment materials • videos, CDs and audio tapes
End-to-end implementation of organisational learning strategy includes:	• assessment • delivery • design • development • presentation • reporting and managing activities that span the full supply chain such as quality, procurement, record keeping and administration

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Learning and Development

Co-requisite units

Co-requisite units		

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BSBLED703A Implement improved learning practice

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to initiate and implement advanced learning practice that supports the improvement of learning strategies in an organisational context. The unit also covers evaluating ways to improve learning practice, managing and monitoring means to improve learning, and analysing and advancing adoption of improved learning practice. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to leaders or managers using learning to build organisational capabilities. It focuses on using research, theoretical analysis and professional investigation to identify ways of improving learning practice and implementing appropriate pedagogy. Methods for improving learning practice include developing individual staff members from the perspective of the organisation's needs and imperatives, and enhancing outcomes for learners and candidates. The unit may relate to learning activities within a small to medium sized organisation, or to a significant unit of activity in a large organisation.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Evaluate ways to improve learning practice	1.1. Review advances in ***learning practice*** within a given vocational, training, educational or content area 1.2. Review and challenge existing learning practice to develop and test improved approaches 1.3. Analyse interests, abilities, relationships and contextual needs of ***relevant individuals*** when promoting improved learning practice 1.4. Research how a range of ***appropriate learning theories*** and ***instructional design principles*** can improve learning practice 1.5. Ensure learning practice reflects ***qualification requirements*** for nominated qualification/s

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ELEMENT	PERFORMANCE CRITERIA
2. Manage and monitor means to improve learning	2.1. Observe and assess ***learner styles*** with respect to appropriateness of current vocational, training and educational ***learning strategies*** 2.2. Evaluate the role and impact of new technologies on learners and ***training techniques*** 2.3. Plan improved learning practice based on how learners currently learn 2.4. Plan improved learning practice based on experience and personal interests of the learner
3. Analyse and advance adoption of improved learning practice	3.1. Develop improved vocational, training and educational learning practice appropriate to ***learner characteristics*** 3.2. Advocate for improved vocational, training and educational learning practice 3.3. Initiate ***research*** into improved learning practice 3.4. Design and test improved learning practice in real-world situations 3.5. Mentor colleagues to promote improved learning practice

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - demonstrate and model varied delivery and facilitation methods and techniques
  - give instruction, presentations and lectures
  - guide facilitation of individual and group learning activities, group work and case studies
  - initiate and facilitate group discussions
  - brainstorm activities
  - provide and guide practice opportunities
  - enable and support effective learner participation
  - tutor
  - conduct project-based activities
  - coach and mentor

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REQUIRED SKILLS AND KNOWLEDGE

- undertake blended delivery
- learning-related skills to monitor learner progress, difficulties and readiness for assessment or new areas of learning
- planning and organising skills to evaluate effectiveness of learning practice, and to analyse and identify suitable learning practice and learning strategies for groups and individual learners
- teamwork skills to monitor group and individual interactions
- technology skills to complete electronic research, and to review and discuss learning modes and practice that involves information and communication technology.

Required knowledge

- contemporary policy and approaches to vocational learning and assessment
- content and requirements of the relevant delivery and assessment strategies
- content of learning resources and learning materials
- design and management of learning objects and content
- different learning styles and how to encourage learners, for example:
  - theoretical learners
  - pragmatic learners
  - activist learners
  - reflective learners
  - kinaesthetic learners
  - audio learners
  - visual learners
  - tactile learners
  - left and right brain learners
- learners and context of learning
- learning principles, for example connections of learning and experience, and adult learning principles
- range of appropriate learning strategies, and teaching and assessment methods
- research skills relating to pedagogical theory and practice, learner interests and changing learning styles, and application of information and communication technology to learning and teaching
- sources and availability of relevant learning resources and learning materials
- theory and practice relating to adult learning
- training techniques which enhance learning and when to use them, for example using:
  - instruction and explanation
  - questioning
  - practice

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REQUIRED SKILLS AND KNOWLEDGE
• written information • group, pair and team activities • individual activities • demonstration.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • knowledge of adult learning practice • construction of pedagogically sound contextually relevant learning strategies and improved learning practice • research on theory and practice in relation to advanced learning practice, especially where these are enabled by new content solutions, vocational, training and educational approaches, or technologies.
Context of and specific resources for assessment	Assessment must ensure: • competence is consistently demonstrated over time, and over a range and variety of complex situations • access to required assessment facilities and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of applied projects or learning activities, relating to the research, construction and testing of advanced learning practice for a specific target audience and learning content in a given vocational, training and educational context • direct observation of contextual application of skills

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EVIDENCE GUIDE	
	• oral or written questioning to assess knowledge of constructing and implementing advanced vocational, training and educational learning practice.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBINN801A Lead innovative thinking and practice • BSBLED701A Lead personal and strategic transformation • BSBLED702A Lead learning strategy implementation.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Learning practice may be:	• applicable pedagogy or learning theories and their relationship to the vocational, training and educational strategies, techniques and approaches that can be used to improve learning
Relevant individuals may include:	• employers • employees, staff • government agencies and departments • industry associations, employer bodies • industry representatives • learners/students • national Industry Skills Councils • professional associations • regulatory, licensing, compliance authorities • research agencies • state and territory industry training advisory bodies • subject or technical specialists and experts

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RANGE STATEMENT	
	• unions • universities
Appropriate learning theories may include:	• action science • applied learning models • behavioural learning theory • cognitive learning theory • constructivist • discovery learning • humanistic • information processing theory • problem-based • situational • social learning
Instructional design principles may include:	• application of adult learning principles • inclusion of a variety of approaches and techniques for presenting information and activities and for encouraging participation by learning • need for learner activity and interactivity • opportunities for review of material and repetition • presenting material in a logical order and sequence • presenting material in order of increasing difficulty • structuring information effectively

Qualification requirements may include:	• relevant Training Package qualification packaging rules
	• Australian Qualifications Framework (AQF) guidelines for qualifications, including:
	  • key features of each qualification
	  • guidelines for each qualification title
	  • national guidelines on cross-sector linkages
	  • issuing a qualification
	• Australian Quality Training Framework (AQTF) Standards for State and Territory Registering/Course Accrediting Bodies
	• levels and aspects of communication as described in the National Reporting System (NRS)

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RANGE STATEMENT	
Learner styles may include:	• activist • auditory • global, analytical • kinaesthetic • left and right brain • pragmatist • theoretical • reflective • visual
Learning strategies would include:	• being logical, innovative and engaging to the learner group • establishing the learning context • identifying learner and client needs • identifying the delivery and assessment arrangements • identifying units of competency or other criteria which best reflect these needs • indicating pathways to, from and within the qualification; identifying the operational resources needed to deliver the strategy • outlining the learning framework which has been designed and sequenced to maximise learning • providing a review process both before and after implementation
Training techniques may include:	• demonstration • group, pair and team activities • individual activities • instruction and explanation • practice • questioning • written information
Learner characteristics may include:	• cultural background and needs • employment status • language, literacy and numeracy requirements • level of formal schooling in Australia or overseas • level of maturity • past learning experiences • preferred learning styles • specific needs, physical or psychological

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RANGE STATEMENT	
Research may be compiled through:	• evaluations of existing products • focus groups • informal discussions • internet • interviews • literature reviews • questionnaires • workshops

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Learning and Development

Co-requisite units

Co-requisite units		

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BSBLED704A Review enterprise e learning systems and solutions implementation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to design, review and implement advanced enterprise electronic learning (e learning) solutions as a member of a senior management team. The unit covers evaluating trends in e learning in relation to organisational plans, monitoring e learning resources, and ensuring any proposed solutions are tested and evaluated against organisational requirements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to leaders or managers working to ensure learning can enhance individual, team and organisational capabilities. Managing the introduction of information and communication technology (ICT) to positively affect learning related processes and procedures may involve a complex range of considerations and choices. Processes to oversee and guide the evaluation of e learning technologies and systems are often necessary to support the provision of quality training and assessment services. The unit may relate to learning activities within a small to medium sized organisation or to a significant unit of activity in a large organisation. Leaders in learning can be required to improve how an organisation adopts, modifies or integrates existing ICT learning and related processes.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Evaluate trends in e learning	1.1. Identify and differentiate ***forms of e-learning***
	1.2. Analyse trends in deployment of ICT in education and learning
	1.3. Analyse and evaluate integration of ICT for learning and ***business purposes***
	1.4. Explore how the convergence of different technologies can affect learning practice

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ELEMENT	PERFORMANCE CRITERIA
2. Monitor e learning resource alignment to organisational requirements	2.1. Research trends in teaching methods associated with different types of electronic learning resources 2.2. Determine organisation's strategic and learning requirements 2.3. Analyse and report risks associated with e-learning implementation 2.4. Devise policy and procedures to ensure ***brief***, focus and type of e-learning resources are designed appropriate to ***organisational requirements*** 2.5. Establish how ***international e-learning regimes***, ***human resources and learning policies and procedures*** will affect the design of e-learning resources
3. Test and evaluate e learning solutions	3.1. Set the parameters for testing e-learning solutions consistent with technical, user and organisational requirements 3.2. Review ***e-learning resources*** and ***e-learning systems or solutions*** against criteria tied to learner and organisational requirements 3.3. Adjust learning resource design or delivery methods where required to meet changing user and organisational requirements 3.4. Test and evaluate ***instructional design principles*** as appropriate for the given ***focus*** and context 3.5. Consult with learners, educators, designers and other personnel to evaluate ***constraints relating to organisation's e-learning systems and resources*** 3.6. Use ***research findings*** and reports on suggested improvements to e-learning resources or systems design to inform future practice

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to: • collaborate and work with vendors and consultants

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REQUIRED SKILLS AND KNOWLEDGE

- share ideas and information
- seek feedback on e-learning design
- research suitability of learning content for electronic development
- identify constraints, resources, standards and guidelines required to design and developing e-learning resources

- learning-related skills to represent e-learning design in a variety of ways such as:
  - describing learner's pathway through a program to a designer
  - writing e-learning pathways in a report
  - describing e-learning pathways in a sketch or drawing
  - referring to examples of other e-learning products with similar attributes to the desired online outcome
- planning and organising skills to:
  - develop a learning strategy for an organisation
  - anticipate or predict risks
  - plan for contingencies
  - generate options for e-learning resources
- problem-solving, initiative and enterprise skills to:
  - research and analyse learning theory and processes
  - design e-learning resources that meet Australian Quality Training Framework (AQTF) and other formal requirements, for example when designing resources to support endorsed Training Packages
- teamwork skills to collect and respond to user feedback to improve e-learning solutions and resources
- technology skills to:
  - use and understand electronic technology
  - identify international standards regimes and specifications that apply to the design of e-learning
  - confirm the technology to be used for different modes of teaching and learning.

Required knowledge

- assessment instrument and strategy design
- continuous improvement processes
- e-learning resource and systems testing and evaluation strategies
- information technology principles and terminology for example those related to using the internet, reviewing technology capabilities, describing e-learning methodologies and using related vocabulary
- how to create an effective learning experience using electronic technology, for example by using:
  - multiple perspectives
  - opportunities for reflection

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REQUIRED SKILLS AND KNOWLEDGE
• opportunities for collaborative learning • authentic assessment • incremental learning • variety • organisation • good practice design • instructional design for electronic materials, for example: • systematic instructional strategies • learning design principles • criterion-referenced assessment • order of increasing difficulty • opportunities for review of material and repetition • need for interactivity • inclusion of a variety of approaches and techniques for presenting information and activities • structure and sequencing of information • what happens if the learner makes a mistake • how to get help • techniques to hold user's attention • designing visual interface for improved learning, including graphics, use of fonts and white space, repetitive items • learning strategy design • organisational learning theory • organisational policies and procedures • quality management compliance requirements • relevant obligations under the AQTF Standards for Registered Training Organisations (if applicable) • range of e-learning environments and their application in designing e-learning resources • relevant policy, legislation, codes of practice and national standards including commonwealth and state/territory legislation.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • analysis, design, implementation and evaluation of an e-learning solution to meet a business need or the needs of a specified user group • documented review and confirmation of appropriateness of e-learning resources and policies and procedures to meet organisational and individual learner needs • knowledge of e-learning resources and systems testing and evaluation strategies.
Context of and specific resources for assessment	Assessment must ensure: • competenceis consistentlydemonstrated over time, and over a range and variety of situations • access to required assessment facilities and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of applied projects or learning activities, for example covering e-learning system evaluations, research on trends in e-learning, review and confirmation of appropriateness of e-learning resources to organisational and individual learner needs, policies and procedures for e-learning resources, and selection of appropriate e-learning resources • direct observation of contextual application of skills • oral or written questioning to assess knowledge of range of e-learning environments and their application in designing e-learning resources.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBINN801A Lead innovative thinking and practice • BSBITB701A Implement advanced electronic

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EVIDENCE GUIDE	
	technologies • BSBLED702A Lead learning strategy implementation • BSBLED703A Implement improved learning practice • PSPHR616A Manage performance management system.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Forms of e-learning may vary with:	• assessment or qualification outcomes • blending with other modes of teaching (for instance blending classroom with online delivery) • instructional design • means of access • mode of teaching • standards compliance • technology involved
Business purposes may vary with factors and issues relating to:	• ability to gain and respond to customer feedback • available resources (in all their form) • business systems • changes to workflow and processes • competency, capability and skills of the workforce • culture and values • economic change • emerging technologies • executive support for innovation • external • globalisation

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RANGE STATEMENT	
	• government regulations, policy or funding initiatives • internal • labour market and industry changes and restructures • learning culture • management practices • new business models • new markets • research and development focus and support • shift to knowledge economy or new economy • structure and design of work in the organisation • technology change and convergence • vision, core purpose and capabilities
Brief may include:	• identified gap in learning product market • proposal developed for a client or supplier of products and services • tender for an organisational need
Organisational requirements may include:	• access and equity principles and practices • business and performance plans • collaborative or partnership arrangements • confidentiality requirements • defined resource parameters • ethical standards • goals, objectives, plans, systems and processes • legal and organisational policies, guidelines and requirements • occupational health and safety policies, procedures and programs • quality and continuous improvement processes and standards • quality assurance and procedures manuals • recording and reporting procedures
International e-learning regimes such as:	• Advanced Distributed Learning Co-Laboratory (ADL Co-Lab) (i.e. Sharable Content Object Reference Model - SCORM) • Aviation Industry Computer-based training Committee (AICC) • IMS Global Learning Consortium (i.e. IMS Learning design)

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RANGE STATEMENT	
	• Institute of Electrical and Electronics Engineers (IEEE) (i.e. Learning Object Metadata - LOM)
Human resources and learning policies and procedures may include:	• framework for consultation processes with industry for development of training and/or assessment services • framework under which the provision of training and assessment services is conducted • identification of roles and responsibilities of key personnel in an organisation • mechanism to facilitate continuous improvement within the training and assessment organisation • transparency of the training and assessment organisation's approach to training or assessment services
E-learning resources may include:	• assessment materials • generic skills materials • industry or enterprise specific materials • information about the audience for the learning resource • learning objects, activities • professional development materials • self-paced or instructor-led materials • trainer or facilitator materials • Training Package toolboxes
E-learning systems or solutions may include:	• ICT deployed as infrastructure, hardware, software, or applications to support the full range of learning activities (i.e. from design to reporting of outcomes)
Instructional design principles may include:	• ensuring learning is embedded in a realistic and relevant context • how to get help • inclusion of a variety of approaches and techniques for presenting information and activities and for encouraging participation by learning • need for authenticity in learning and assessment activities • need for collaborative learning opportunities • need for learner-centred activities and interactivity

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RANGE STATEMENT	
	• opportunities for review of material and repetition • presenting material in a logical order and sequence, and in order of increasing difficulty • structure of the information • techniques to engage the learner in learning • what happens if the learner makes a mistake (feedback)
Focus may include:	• accredited course • individual units of competency, modules of accredited courses • learning program • learning resource to support introduction or implementation of new technology or equipment • non-accredited course • traineeship or apprenticeship qualification • Training Package • Training Package qualification
Constraints relating to organisation's e-learning systems and resources may include:	• access to relevant technical or subject matter experts • anticipated difficulties due to language, literacy and numeracy skills of learners/end users • financial limitations to achieve proposed options • limited access of intended learners/end users to the necessary technology • limits of the technology and what types of things it can do • logistical issues • low levels of information technology skills of trainers or facilitators and intended learners/end users
Research findings may be compiled through:	• evaluation of existing products • focus groups • informal discussions • internet • interviews • literature reviews • questionnaires

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RANGE STATEMENT	
	• workshops

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Learning and Development

Co-requisite units

Co-requisite units		

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BSBLED705A Plan and implement a mentoring program

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan, develop and implement a mentoring program and to review the outcomes for those involved in the program. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to leaders working to ensure learning advances individual and organisational capabilities. The mentoring program may apply to a: particular section or group within an educational organisation (for example, as part of a Registered Training Organisation's professional development activities) specific business purpose or objective within an enterprise whose core business is not education collaborative partnership that spans more than one organisation (such as to advance occupational or industry specific skill needs). This unit may relate equally to small scale learning activities within a small to medium sized organisation or to a significant activity in a large organisation. Leaders in learning must be able to plan, implement, monitor and evaluate a mentoring program that results in learning forged through a defined and active learning partnership with a mentor. The program should develop and use tools that enhance both the learning and the phased relationship, and it should be monitored and evaluated to ensure it explores and meets the mentee's

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	learning needs.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Plan a mentoring program	1.1. Determine benefits of and need for, a ***mentoring program*** 1.2. Define ***mentoring program purpose and objectives*** 1.3. Develop a ***mentoring program plan*** with appropriate ***outcomes*** in consultation with ***key***

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ELEMENT	PERFORMANCE CRITERIA
	stakeholders 1.4. Establish ***relevant management structures*** and wider support requirements 1.5. Determine ***mentoring program modes and methods*** 1.6. Determine methods and resources required to report on mentoring program outcomes
2. Develop tools and materials to support a mentoring program	2.1. Develop a range of ***tools and resources*** appropriate to mentoring program modes and methods 2.2. Establish ***mentor*** and ***mentee*** selection criteria, procedures and tools 2.3. Establish ***formal requirements for the mentor-mentee relationship*** and communicate these requirements to all parties 2.4. Establish rules, procedures and requirements that encompass key ***accountabilities and responsibilities*** 2.5. Develop the means to report and collate outcomes from the mentor-mentee relationship
3. Coordinate mentor and mentee relationships	3.1. Implement strategies for recruiting and accurately ***matching*** mentors with mentees 3.2. Induct mentors and mentees into the program 3.3. Ensure plans required for personal growth are developed by mentors and mentees 3.4. Cultivate rapport, mutual trust and teamwork in the mentoring relationship 3.5. Consider and address cultural differences and diversity issues in all mentor-mentee communications 3.6. Use ***data and reporting tools*** supporting the program to monitor the mentor-mentee relationship
4. Evaluate a mentoring program	4.1. Complete ***mentoring record keeping and reporting*** requirements using agreed technology, reporting processes and procedures 4.2. Evaluate mentoring program against agreed outcomes and report through relevant management structures 4.3. Document improvement opportunities for future mentoring programs based on program evaluation

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - maintain appropriate relationships with colleagues and individuals in the mentoring program
  - establish trust
  - value and be open to, the opinions of others
  - work as part of a team
  - use active listening techniques
  - negotiate
  - encourage and accept feedback
- language skills to:
  - communicate organisational ideas, policies and procedures
  - encourage participation across all levels of personnel and clients
  - seek opinions and elicit feedback from a range of stakeholders
- planning and organising skills to plan a mentoring program and to schedule mentor-mentee interviews and sessions
- problem-solving skills to select and screen applicants for mentoring program, and to assist with resolution of issues that might arise during the program
- self management skills to evaluate personal effectiveness and to manage own time and resources
- teamwork skills to conduct mentor and mentee selection, and to monitor the progress of mentoring program in a team context
- technology skills to undertake record keeping and reporting using agreed technology, and to complete electronic communication and data sharing.

Required knowledge

- content and data reporting and storage options
- how to complete the required data collection
- legislation, regulations, codes and policies relevant to the organisation's operations and methods for mentoring
- mentoring program design principles
- relevant communication processes and methods
- reporting methods
- requirements for mentoring tools
- screening techniques, and confidentiality and privacy issues.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing mentoring program plan in consultation with others • working within the relevant management structure to gain executive support for mentoring program • facilitating mentor and mentee selection process • knowledge of relevant legislation specifically in relation to confidentiality and privacy.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • competence is consistently demonstrated over time, and over a range and variety of mentoring programs.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • completion of applied projects or learning activities • direct observation of application of skills in context • oral or written questioning to assess knowledge of mentoring program design principles • review of mentoring program plan.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLED702A Lead learning strategy implementation • BSBLED706A Plan and implement a coaching strategy • BSBREL701A Develop and cultivate collaborative partnerships and relationships

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EVIDENCE GUIDE	
	• PSPHR616A Manage performance management system • PSPMNGT614A Facilitate knowledge management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Mentoring program is a:	• formal program designed to forge relationships between a mentor and a mentee to achieve outcomes relating to:
	  • context
	  • individual needs
	  • knowledge transfer
	  • learning
	  • performance
	  • support

Mentoring program purpose and objectives may be:	• strategic • tactical or operational • quantifiable or quantitative • varied in duration (short-term versus long-term) • to target personal, organisational or other outcomes
Mentoring program plan may include:	• administration • amount of material support • anticipated outcomes • content and resources • program design principles • facilities and location • mentee's learning style • mentor's skills • method or mode of interaction (i.e. physical or

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RANGE STATEMENT	
	electronic) • omissions • scope • reporting requirements • roles and responsibilities for key individuals (mentors, mentees, program coordinator, steering committees) • workplace application • time lines
Mentoring program outcomes may include:	• behavioural • compliance • functional • operational • personal
Key stakeholders may include:	• coordinators • mentees • mentors • organisational management and staff • peers • public • public agencies, especially regulators • suppliers and learning partners
Relevant management structures may include:	• executive endorsement • grievance procedures • policies and procedures • program coordinators • program management or reference group • program measures and evaluation mechanisms • program reporting mechanisms • resources management and allocation • steering committee

Mentoring program modes and methods may vary in terms of:	• duration of program or individual sessions
	• individual or group mentoring:
	  • one mentor to one mentee
	  • one mentor to many mentees
	  • many mentors to many mentees
	• physical or electronic enablement (i.e. e-mentoring)
	• peer mentoring versus independent or external mentoring

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RANGE STATEMENT	
	• tools and instruments being used
Tools and resources may include:	• communication fliers and explanatory materials • documents establishing the ground rules of the mentoring relationship • electronic or physical presentation design • instruments for mentor-mentee selection processes • range of technologies (online or computer-based) • templates for personal mentoring plans
Mentor is:	• an independent person engaged in a two-way communication relationship with a mentee, whose primary role is to provide constant encouragement and assistance that enhances the mentee's attainment of personal and/or work related needs
Mentees may include:	• an individual engaged in a two-way communication relationship with a mentor primarily aimed at the transfer of wisdom, encouragement and assistance related to personal and/or work related needs • a mentee may also be called a mentoree, candidate, participant, trainee, employee, student
Formal requirements for the mentor-mentee relationship include:	• compliance • equal employment opportunity • legal • regulatory
Accountabilities and responsibilities means:	• who is responsible and accountable for given roles, actions and outcomes within the mentoring program
Matching criteria may include:	• access issues • behaviours • key performance outcome statements or indicators • learning or communication styles • personal or professional attributes • skills and knowledge
Data and reporting tools supporting a mentor program may	• collaboration modes and means • databases used

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RANGE STATEMENT	
vary in terms of:	• information system design • network configuration and access requirements • security and privacy requirements
Mentoring record keeping and reporting may be:	• completed through physical or electronic means

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Learning and Development

Co-requisite units

Co-requisite units		

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BSBLED706A Plan and implement a coaching strategy

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan and develop a coaching strategy and to monitor the implementation of the resulting coaching program within an organisational context. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to leaders working to ensure learning advances individual and organisational capabilities. A coaching strategy may be: •an internal program forming part of the professional development activities of an educational organisation (such as a Registered Training Organisation) or an enterprise whose core business is not education •developed for an external client, for example as part of the range of learning services offered or conducted in a collaborative partnership with more than one organisation. Leaders in learning are typically required to develop and implement coaching strategies in a systematic manner and to monitor, review and improve strategies to optimise learning outcomes for individuals and the organisation.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop coaching strategy	1.1. Research and review the need for and role of, ***coaching*** within an organisation 1.2. Establish a framework for the ***coaching strategy*** based on ***organisational context and needs*** 1.3. Determine roles, responsibilities and outcomes for ***key individuals*** involved in the coaching strategy 1.4. Develop time lines for coaching strategy implementation in consultation with ***stakeholders*** 1.5. Obtain organisational support for coaching strategy in accordance with organisational procedures
2. Prepare for coaching strategy implementation	2.1. Plan the coaching program and ***coaching models*** to suit the coaching strategy and the organisation's ***worker and employer issues***

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ELEMENT	PERFORMANCE CRITERIA
	2.2. Design induction and training requirements 2.3. Design ***tools and resources*** for coaches and trainees 2.4. Analyse ***legal***, ***regulatory and organisational compliance requirements*** for coaches 2.5. Establish recruitment processes for coaches and trainees
3. Implement coaching strategy	3.1. Promote coaching program 3.2. Recruit and select coaches and trainees 3.3. Establish tools, mechanisms and procedures for matching and managing the ***coach-trainee relationship*** 3.4. Induct, match and brief coaches and trainees
4. Monitor and support coaching strategy	4.1. Ensure coaching strategy is implemented consistent with work practices and operational requirements 4.2. Provide coaches with access to professional development and support necessary to acquit their role effectively and efficiently 4.3. Design ***techniques and practices for resolving differences*** and problems in coaching relationships 4.4. Monitor coaching relationships to ensure they are in accordance with organisational policies and procedures 4.5. Recognise and acknowledge the positive contribution individuals make to coaching activities
5. Review and report on coaching strategy	5.1. Collect, analyse and report data in relation to coaching outcomes at individual or group level, in line with organisational context and needs 5.2. Identify and promote ongoing opportunities for coaching in accordance with individual and organisational context and needs 5.3. Evaluate coaching strategy, document findings and present recommendations for improvement to relevant others

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE

Required skills

- communication skills to:
  - maintain appropriate relationships with colleagues and individuals involved in coaching
  - establish trust
  - value and be open to, the opinions of others
  - work as part of a team
  - use active listening techniques
  - negotiate
  - encourage and accept feedback
- learning skills to:
  - develop a learning strategy based on applied research
  - design coaching tools and resources
  - conduct induction processes
- planning and organising skills to:
  - plan coaching program
  - frame a coaching strategy within available resources
  - schedule coaching sessions
- problem-solving skills to:
  - select and screen applicants for a coaching program
  - assist with resolution of issues that might arise during the program
  - conduct needs assessments
- teamwork skills to select and match coaches and trainees, and to consult with and influence a team to effectively deploy coaching strategies
- technology skills to communicate electronically with stakeholders and coaches, and to use technology to facilitate coaching.

Required knowledge

- basic coaching techniques
- coaching program design principles
- communication processes and methods
- data collection methods
- human psychological development
- legislation, regulations, policies, procedures and guidelines relating to workplace coaching
- reporting methods
- requirements for tools used in coaching processes.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing a coaching strategy in consultation with relevant others • working within the relevant management structure to gain executive support for coaching strategy • adhering to legal and regulatory compliance • recruiting suitable coaches • formation of robust relationships between all parties • knowledge of relevant legislation specifically in relation to confidentiality and privacy.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • competence is consistently demonstrated over time, and over a range and variety of coaching strategies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • completion of applied projects or learning activities relating to planning, monitoring and reviewing a coaching strategy for an organisation • direct observation of application of skills in context • oral or written questioning to assess knowledge of coaching program design principles • review of tools and resources designed for coaches and trainees.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLED702A Lead learning strategy

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EVIDENCE GUIDE	
	implementation • BSBLED705A Plan and implement a mentoring program • BSBREL701A Develop and cultivate collaborative partnerships and relationships • PSPHR616A Manage performance management system • PSPMNGT614A Facilitate knowledge management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Coaching is:	• a defined relationship designed to enhance performance
	• an activity requiring good interpersonal relations
	• an activity which emphasises action or improved performance in a specific area
	• focussed on the acquisition of job skills and knowledge, and is generally short-term
	• frequently identified in personal learning and development plans
	• not necessarily managed in a hierarchical relationship (such as being coached by one's supervisor)
	• results oriented
	• performance or goal directed
	• provided by a coach who:
	  • maintains confidentiality
	  • monitors performance
	  • provides learning opportunities
	  • provides constructive feedback
	  • may have undertaken training or

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RANGE STATEMENT	
	development for the role
Coaching strategy may include:	• administration • amount of material support • application in the workplace • content and resources • expected outcomes • facilities and location • method or mode of interaction (i.e. physical or electronic) • preferred learning style of person being coached • roles and responsibilities for key individuals • reporting requirements • required coaching skills and methods • scope • time lines

Organisational context and needs may be:	• stated in learning and development, and human resources strategies
	• shaped by desired outcomes including:
	  • behavioural
	  • compliance
	  • functional
	  • operational
	  • organisational sociocultural circumstances and issues (for example, within Indigenous organisations)
	  • personal

Key individuals involved in the coaching strategy include:	• coaches • coaching program coordinator • steering committees • trainees
Stakeholders may include:	• associations • Boards/committees of management • coaches • coaching coordinators • employees • government • organisational management and staff • private sector organisations/businesses • public sector organisations/agencies, especially

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RANGE STATEMENT	
	regulators • trainees • suppliers and learning partners • unions
Coaching models may include:	• face to face • virtual of e-mentoring • individual or group based • problem drive (by work, time, tasks, area of expertise, etc) • personal (driven by individual needs not by imposed third party requirements such as work needs)
Worker and employer issues may include:	• certified agreements • contract work and self employment • enterprise bargaining • industrial awards • occupational health and safety • terms and conditions • trade unions
Tools and resources may be:	• communication fliers and explanatory materials • documents establishing the ground rules of the coaching relationship • electronic or physical presentation design • instruments for coach-trainee selection processes • range of technologies (online or computer-based) • templates for personal coaching plans
Legal, ***regulatory and organisational compliance requirements*** may include:	• commonwealth and state/territory legislation such as workplace relations legislation, and copyright and privacy laws as they relate to physical materials and electronic technology • competency standards • licensing requirements • plagiarism • relevant organisational policies, codes of practice and national standards • security of information
Coach-trainee relationship may	• access issues • behaviours

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RANGE STATEMENT	
include:	• hierarchical relationship (such as being coached by one's supervisor) • key performance outcome statements or indicators • learning or communication styles • location • personal or professional attributes • skills and knowledge
Techniques and practices for resolving differences may include:	• finding a mutually beneficial solution • inviting discussion • providing explanations • not taking it personally when information is rejected or contradicted • not laying blame • self-disclosure • using 'I' messages (focusing on the giver of the message) rather than 'you' messages (focusing on the receiver of the message)

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Learning and Development

Co-requisite units

Co-requisite units		

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BSBLED707A Establish career development services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan, implement and evaluate career development services in accordance with professional standards to facilitate well considered career decision making by participants. The unit also covers maintaining professional career development standards in an ongoing manner. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to leaders seeking to provide career development services in accordance with professional standards. Careers are unique to each person and are dynamic, unfolding throughout life. Careers include how a person balances paid and unpaid work, and personal life roles. A wide range of career development programs and services may be provided in many different jurisdictions and delivery settings. Their object is to assist individuals to gain the knowledge, skills, attitudes and behaviours required to manage their life, learning and work in self directed ways.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Apply career development standards	1.1. Research contemporary ***career development*** theories, models, frameworks and strategies in relation to a specific context and ***target group***
	1.2. Analyse codes of professional conduct and ***career development standards***, and how they can be applied in work practice
	1.3. Apply regulatory requirements, policies, guidelines, standards and resources
	1.4. Plan for and undertake, ongoing personal professional development
	1.5. Apply career development standards to all aspects of work role
	1.6. Establish and maintain relationships with professional peers and service providers

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ELEMENT	PERFORMANCE CRITERIA
2. Plan for career development services	2.1. Apply career development theories in preparing to work with specific target groups 2.2. Analyse career development needs of specific target groups 2.3. Plan for the ***support systems and resources*** required to provide ***quality career development service*** delivery in a specific context and for a target group 2.4. Apply ***effective action planning skills*** in ***career development counselling*** services 2.5. Establish ongoing professional and follow-up support for clients of career development services
3. Implement career development services strategies	3.1. Develop strategies for career development services to reflect the contextual needs and aspirations of the specific target group 3.2. Encourage individuals to commit to and access, career development services 3.3. Establish mechanisms to follow-up the provision of career development services 3.4. Implement strategies to ensure records storage, security and privacy in accordance with professional and organisational requirements 3.5. Establish referral procedures and contacts
4. Review career development services delivery strategies and plans	4.1. Review career development services, service delivery strategies against ***plans*** and standards, and identify any gaps 4.2. Advocate for target group and individual career development needs and choices 4.3. Determine strategies to improve the quality of career development services 4.4. Discuss alternative career development strategies with ***key stakeholders***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

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REQUIRED SKILLS AND KNOWLEDGE

• communication and teamwork skills to:
  • provide advocacy and support for the target group
  • establish and maintain professional relationships
  • consult with key stakeholders
• literacy skills to read and interpret structurally intricate career development texts, and to develop reports which deal with complex ideas and concepts
• planning and organising skills to:
  • research career development theories
  • plan career development services, support systems, resources and service delivery
  • keep accurate records and reports
  • plan and complete own professional development
• problem-solving, initiative and enterprise skills to:
  • apply appropriate career development theories to meet client needs
  • analyse the career development needs of a particular client group and to develop strategies for career development
  • assess career development needs using professional and robust tools
• self management and learning skills to:
  • maintain professional standards
  • comply with legislation, codes of practice, and organisational policies and procedures
  • act as a role model in the workplace
  • refer individuals to other careers development experts
• technology skills to use communication technologies, electronic and IT support systems.

Required knowledge
• career development policy and procedures in the given context of application • common patterns of thinking, feeling and behaviour, and the impact on individual career choices • human psychology and needs in relation to career choices • organisational policies on career development.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • rigour in analysing, planning, implementing and evaluating career development services • collecting, evaluating and using appropriate information when forming career development strategies and related support systems and resources • appreciation of the diverse perspectives individuals can bring to any learning situation or the workplace as a result of their nationality, gender, ethnicity, experience, age, sexuality or disability • knowledge of organisational policies on career development.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • competence is consistently demonstrated over time, and over a range and variety of situations providing career development services to a professional standard.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • completion of applied projects or learning activities such as plans for career development services, quality systems to support career development services and implementation plans • direct observation of contextual application of skills when developing quality career development services • oral or written questioning to assess knowledge of common patterns of thinking, feeling and behaviour, and the affect on individual career choices.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLED708A Conduct a career development

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EVIDENCE GUIDE	
	session • BSBLED709A Identify and communicate trends in career development • BSBREL701A Develop and cultivate collaborative partnerships and relationships.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Career development may include:	• services intended to assist individuals of any age, and at any point throughout their lives, to make vocational, educational, training and occupational choices and to manage their careers, life, learning and work
Target group may include:	• age • career choices • cultural background and needs • employees • employment status/role • level of education achieved • learners/students • learning styles and preferences • literacy and numeracy skills • location • predetermined service user group • skill/competency profile • socioeconomic background
Career development standards may apply to:	• career related exploration • choice • implementation • maintenance • opportunity development

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RANGE STATEMENT	
	• planning • preparation • review
Career development standards:	• are those competencies or codes set, recognised and authorised by a national body, for instance the Career Industry Council of Australia (CICA); this includes but is not be limited to the Professional Standards for Australian Career Development Practitioners (2006)
Support systems and resources may include:	• career information and support materials • communication technologies, such telephones, TTY and email • electronic and information technology • meeting rooms and facilities • physical support services • policies and rules for clients to complete follow-up with contact staff or service providers
Quality career development service may include a mix of physical and electronic means to achieve:	• adequate resource needs of the counselling service • capacity to offer a range of choices and advice • careers counselling • compliance with regulatory, professional and organisational standards • effective conflict resolution • identification and removal of any gaps in career counselling services • negotiation, advocacy, enterprising, coaching and mentoring skills • relevance, currency and appropriateness of services provided to individuals • satisfaction of needs associated with a specific context and target group
Effective action planning skills may include:	• appropriate session closure • developing contingency plans • exploring options • factoring in time lines • identifying and accessing resources • identifying and addressing barriers • making referrals • planning sub-steps

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RANGE STATEMENT	
	• reinforcing commitment and empowering individuals
Career development counselling may be:	• occupation or position specific • general in relation to a number of occupations or an industry • one-off or ongoing • formal or informal • expanding and narrowing choice, or specific to a career choice

Plans may include:	• career development plan for an individual or group
	• operational plan
	• resource plan
	• session plan
	• taking into account the:
	  • needs of target group
	  • resources required to access services (such as access to internet service providers, other technology or transport facilities)

Key stakeholders may include:	• associations • Boards/committees of management • employees • employers • government • learners/students • organisational management and staff • private sector organisations/businesses • public sector organisations/agencies, especially regulators • suppliers and learning partners • teachers/trainers • trainees • unions

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Workforce Development - Learning and Development

Co-requisite units

Co-requisite units		

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BSBLED708A Conduct a career development session

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to conduct career development sessions that promote well considered solutions and opportunity oriented career and life decision making. The unit also covers applying appropriate career development theory; assisting individuals to make informed career choices; communicating professionally to promote career development outcomes; and using resources and technology to support career development sessions. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to leaders seeking to conduct career development sessions in accordance with professional standards. Careers are unique to each person and will vary with specific target audiences. Career development sessions may be provided in a variety of ways given the different organisational contexts, individuals involved and delivery settings. The professional expertise of the provider and their use of effective interpersonal and communication skills are central to the success of a career development session.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Apply appropriate career development theory	1.1. Research the major ***career development*** theories and models 1.2. Analyse the differences between advice, information provision and professional standards in relation to career development 1.3. Apply theory in an appropriate manner, both to individuals involved and in relation to the context for a ***career development session*** 1.4. Evaluate models appropriate for individual and group career development sessions

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ELEMENT	PERFORMANCE CRITERIA
	1.5. Analyse ***diversity*** in relation to individuals and the target group, when planning a career development session
2. Conduct career development sessions	2.1. Conduct ***career development counselling*** in a clear and unambiguous manner 2.2. Complete problem and goal clarification to the satisfaction of all involved 2.3. Utilise ***key skills*** to successfully complete career development sessions 2.4. Identify common patterns of thinking, feeling and behaviour that limit making or acting upon well considered choices, and devise counter strategies 2.5. Effectively apply ***rapport building and attending skills*** 2.6. Ensure participants set personal goals and make informed choices in the career development session 2.7. Consistently apply ***effective responding skills*** when giving feedback on progress during career counselling session
3. Assist individuals make informed career choices	3.1. Assist individuals to identify career development needs 3.2. Determine individual needs and aspirations holistically, in the context of individuals' lives 3.3. Identify individual career development needs that fall outside the scope of practice of the career development service provider 3.4. Refer individuals to or inform them about, appropriate sources of further information or career development support services where required
4. Communicate professionally to promote career development outcomes	4.1. Communicate an accurate assessment of individual needs 4.2. Create a cooperative and productive environment for the conduct of a career development session 4.3. Create a climate of trust, comfort and safety for the conduct of career development sessions 4.4. Complete career development work in an ethical, cooperative and respectful manner within the team and wider organisational context
5. Use resources and technology to support career development	5.1. Acquire, record and prepare relevant information prior to a career development session 5.2. Prepare accurate records and reports in accordance

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ELEMENT	PERFORMANCE CRITERIA
sessions	with ***professional conduct and career development standards*** 5.3. Assist individuals to use relevant ***support resources and technology*** 5.4. Monitor support resources and technology to ensure they support ***quality outcomes for career development services***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to interpret structurally intricate career development information and to develop reports which deal with complex ideas and concepts
- communication and teamwork skills to:
  - provide advocacy and support for individual needs and career choices
  - use a wide range of effective communication techniques, and methods and tools such as conflict resolution, negotiation, responding, creative coaching and mentoring
- planning and organising skills to:
  - research career development theories and models
  - plan, conduct and report on career development and counselling sessions
  - keep accurate records and reports
- problem-solving, initiative and enterprise skills to:
  - apply appropriate career counselling techniques and career development models to meet client needs
  - establish a safe, comfortable, trusting relationship and environment within which to conduct career sessions
  - conduct career development related assessments using professional and robust tools and techniques
- self-management and learning skills to:
  - conduct career development sessions ethically, cooperatively and respectfully
  - assist others to set personal and life goals
  - refer individuals to other experts in the field where required
- technical skills to:
  - use, and assist others to use, resources and technology in providing career

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REQUIRED SKILLS AND KNOWLEDGE
development sessions • monitor support resources and technology.
Required knowledge
• common patterns of thinking, feeling and behaviour and their impact on individual career choices • concepts and principles relating to service provision: lifelong learning, holistic career development, career counselling, career decision making, career coaching, career maintenance, work satisfaction, employability, enterprising, positive uncertainty and planned happenstance • human psychology and needs in relation to careers counselling • organisational policies and procedures on counselling.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • rigour in analysing, planning, implementing and evaluating individual and target group career development needs • effective communication during a career development session and when providing information services • using technology and other means to collect, assess and store information for use in a career development services setting • capacity to review each individual's needs, taking into consideration the diverse perspectives individuals might hold in relation to characteristics such as their nationality, gender, ethnicity, class, age, sexuality or disability • application of knowledge of a range of concepts and principles relating to service provision.
Context of and specific resources for	Assessment must ensure:

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EVIDENCE GUIDE	
assessment	• access to an actual workplace or simulated environment • competence is consistently demonstrated over time, and over a range and variety of situations providing career development sessions to a professional standard.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • applied projects or activities such as collection of resources and information in relation to career development, conduct of career information sessions • direct observation of contextual application of skills in a number of career development sessions conducted for a range of individuals and groups • oral or written questioning to assess knowledge of providing vocational career development counselling.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLED707A Establish career development services • BSBLED709A Identify and communicate trends in career development.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Career development may include:	• services intended to assist individuals of any age, and at any point throughout their lives, to make vocational, educational, training and occupational choices and to manage their careers, life, learning and work
Career development sessions may	• expanding and narrowing choice, or specific to

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RANGE STATEMENT	
be:	a career choice • formal or informal • general in relation to a number of occupations or an industry • occupation or position specific • one-off or ongoing
Diversity includes variations in:	• age • belief systems and values • culture • expertise, experience and working styles • gender • interpersonal style • interests • language, literacy and numeracy • physical differences • political viewpoints • race and ethnicity • religious beliefs • sexual orientation • thinking and learning styles
Career development counselling may include:	• expanding and narrowing choice, or specific to a career choice • formal or informal • general in relation to a number of occupations or an industry • occupation or position specific • one-off or ongoing
Key skills to successfully complete career development sessions include:	• advocacy • coaching and mentoring • conflict resolution • creativity • negotiation
Rapport building and attending skills may include:	• establishing a conducive environment • using non-verbal and verbal encouragement • using timely and appropriate pauses, tone, intonation, gestures
Effective responding skills may include:	• exploration of discrepancies and exceptions; positives and negatives; past, current and potential implications • exploration of general and specific examples

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RANGE STATEMENT	
	• intensity hierarchies and reframing questions to assist individuals refine their choices • open and probing questioning to explore situations and contexts, time lines, behaviour, thinking and feelings, relationships • timely, appropriate paraphrasing and summaries
Professional conduct and career development standards may include:	• those competencies or codes set, recognised and authorised by a national body, for instance the Career Industry Council of Australia (CICA); this includes but is not be limited to the Professional Standards for Australian Career Development Practitioners (2006)
Support resources and technology may include:	• career information and support materials • communication technologies, such telephones, TTY and email • electronic and information technology • meeting rooms and facilities • physical support services • policies and rules for clients to complete follow-up with contact staff or service providers
Quality outcomes for career development services may include a mix of physical and electronic means to achieve:	• adequate resource needs of the counselling service • capacity to offer a range of choices and advice • careers counselling • compliance with regulatory, professional and organisational standards • effective conflict resolution • identification and removal of any gaps in career counselling services • negotiation, advocacy, enterprising, coaching and mentoring skills • relevance, currency and appropriateness of services provided to individuals • satisfaction of needs associated with a specific context and target group

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Learning and Development

Co-requisite units

Co-requisite units		

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BSBLED709A Identify and communicate trends in career development

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to conduct the research required to identify and communicate career trends. It establishes the need to interact professionally with others in assessing career needs in order to effectively assist clients identify the competencies they require for a career and employability in a given context. The unit also covers maintaining quality of career development services and professional practice. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to leaders seeking to identify and communicate trends in career development. Careers are unique to each person and will vary within and across countries, industries, occupations, organisational contexts, individuals involved and jurisdictions. The relevance, currency and validity of the physical and electronic information sources used are central to the success of career development services. The importance of ongoing research is required to determine how changes to the structure of work, organisations and industries impact on learning and career pathways.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Research and confirm career trends	1.1. Apply knowledge of changing organisational structures, ***lifespan of careers*** and methods of ***conducting work search***, ***recruitment and selection processes***
	1.2. Analyse changing ***worker and employer issues***, rights and responsibilities in a context of changing work practices
	1.3. Examine the importance of ***quality careers development services***
	1.4. Maintain all ***research***, documentation, sources and

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ELEMENT	PERFORMANCE CRITERIA
	references (electronic or physical) to a high degree of currency and relevance 1.5. Analyse implications of ***relevant policy***, ***legislation***, ***professional codes of practice and national standards*** relating to worker and employer issues 1.6. Research changes and trends in relation to the theory of career development counselling and practice 1.7. Confirm clusters, levels and combinations of transferable employability skills and preferences that may open employment options spanning more than one occupation or career pathway
2. Assess and confirm ongoing career development needs of a target group	2.1. Analyse history and records in assessing the needs of a ***target group*** 2.2. Assess success of previous career development services and techniques used for individuals or target group 2.3. Deploy ***other means to investigate appropriate care and counselling approaches*** as required 2.4. Maintain privacy and security of all data, research and personal records according to relevant policy, legislation, professional codes of practice and national standards 2.5. Establish existing work-life balance requirements, issues and needs
3. Maintain quality of career development services and professional practice	3.1. Analyse and review relevance of career theories, models, frameworks and research for a target group 3.2. Incorporate into career development services and professional practice, ***major changes and trends*** influencing the workplace and career related options and choices 3.3. Comply with all relevant policy, legislation, professional codes of practice and national standards that influence the delivery of career development services

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills

• analytical skills to interpret structurally intricate career development information and to develop reports which deal with complex ideas and concepts
• communication and teamwork skills to:
  • determine key elements of effective networking
  • identify, analyse and model effective consultation and collaboration processes and strategies aimed at achieving shared stakeholder objectives
  • apply career counselling techniques
• planning and organising skills to maintain currency and relevance of information, and to maintain quality of services
• problem-solving, initiative and enterprise skills to:
  • research and identify trends in career development and work contexts
  • apply verbal, visual or tactile work search strategies and skills
  • assess and confirm ongoing career development needs
  • resolve security and privacy of data
• self-management and learning skills to:
  • maintain professional practice
  • comply with all policy, legislation codes of practice and national standards
  • maintain privacy and security of client information
  • review and update career development services
• technical skills to access electronic sources of information, and to maintain accuracy and relevance of data.

Required knowledge
• client care, counselling techniques and processes in the context of career development services • counselling techniques • diversity and its potential affect on career choices • human psychological development and needs in relation to careers development • organisational guidelines relating to career development • recruitment and selection processes in the context of career development services • research techniques • trend analysis.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • capacity to research current economic, labour market, employment, career and vocational, educational and training trends • identification of choices and career development needs for individuals and target groups within a given context • reporting and documenting management of research and career development materials • compliance with all relevant local, state/territory and national legislation, policies and practices • knowledge of trend analysis.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • competence is consistently demonstrated over time, and over a range and variety of situations identifying and communicating trends in vocational, educational and training career pathways.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • applied projects or assessment activities, especially related to research and communicating trends in vocational, educational and training career pathways • research documentation or portfolio of evidence relating to identifying trends in vocational, educational and training career pathways • observation of contextual application of skills in communicating trends in career development • oral or written questioning to assess knowledge of research techniques.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLED707A Establish career development services • BSBLED708A Conduct a career development session.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Lifespan of careers may include:	• duration an individual may be able to do a job or specific work • duration of work - for technological, business, economic or social reasons • opportunities arising from a career option (pathways)
Conducting work search, ***recruitment and selection processes*** includes:	• access to and a constant review of, physical or electronic sources • showing customers online careers and employment websites and portals established by government or other providers (i.e. employment service agencies)
Worker and employer issues may include:	• awards • certified agreements • contract work and self employment • enterprise bargaining • occupational health and safety • terms and conditions • unions • work choices
Quality careers development services may include:	• adequate resource needs of the career development service

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RANGE STATEMENT	
	• careers counselling • compliance with regulatory, professional and organisational standards • identification and removal of any gaps in career counselling services • implementation of effective conflict resolution • negotiation, advocacy, enterprising, coaching and mentoring skills • range of choices and advice able to be offered • relevance, currency and appropriateness of services provided to individuals • satisfaction of needs associated with a specific context and target group
Research may include:	• evaluations of existing products • focus groups • informal discussions • internet research • interviews • literature reviews • professional communication mechanisms such as physical and electronic journals, professional newsletters, peer networks, subscriptions • questionnaires • workshops
Relevant policy, ***legislation***, ***professional codes of practice and national standards*** may include:	• competency standards • copyright and privacy laws relating to physical materials and electronic technology • licensing • plagiarism • security of information
Target group may include:	• age • career choices • cultural background and needs • employees • employment status/role • learners/students • learning styles and preferences • level of education achieved • literacy and numeracy skills • location

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RANGE STATEMENT	
	• predetermined service user group • skill/competency profile • socioeconomic background
Other means to investigate appropriate care and counselling approaches may include:	• direct interviews • investigation of files and records • consultation with stakeholders • contact with previous or other counsellors • peer communication and communities of practice • qualitative and quantitative research
Career development may include:	• services intended to assist individuals of any age, and at any point throughout their lives, to make vocational, educational, training and occupational choices and to manage their careers
Major changes and trends encompass local and global causes relating to:	• economic • political • social • technological

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Learning and Development

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBLED710A Develop human capital

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify human capital; to consult on the advantages of human capital with internal and external stakeholders or collaborative partners; and to develop and monitor the capital value attained through implementation of development activities. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to senior leaders or managers working to enhance individual, team and organisational capabilities. While not all senior leaders and managers will operate within an organisation that acknowledges and treats people as a capital asset, training and related people development activities may be advanced by considering principles and practices relating to the concept of human capital. The unit may relate equally to small scale learning activities within a small to medium sized organisation or a significant activity in a large organisation.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify human capital	1.1. Analyse and evaluate the principles of ***human capital*** theory and concepts 1.2. Assess the factors involved in the formation of human capital 1.3. Determine the ***capital asset value*** of human resources in an organisation, an industry or a region 1.4. Determine the relationship between human capital and ***organisational requirements***
2. Consult on the advantages of human capital development	2.1. Develop and prioritise strategies for deploying human capital development strategies to support the ***organisation training needs profile*** in consultation with ***key stakeholders*** 2.2. Negotiate with key stakeholders on opportunities for collaborative human capital development projects

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ELEMENT	PERFORMANCE CRITERIA
3. Develop and monitor human capital development	3.1. Complete ***human capital needs analysis*** and development planning according to organisational requirements 3.2. Analyse and interpret ***information and data*** on human capital gaps and forecasts 3.3. Implement ***options*** and strategies to develop, attract and retain ***talent*** 3.4. Implement options and actions to optimise asset value of human resources in relation to organisational strategic imperatives 3.5. Determine talent and develop the potential of human capital required to meet organisational requirements 3.6. Promote the ***capacity*** of the organisation, team and individual employees to achieve strategic and personal advantage through effort to develop human capabilities

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - research and analyse data
  - communicate ideas and organisational policies and procedures
  - seek opinions and to elicit feedback from a range of stakeholders
  - maintain appropriate relationships with colleagues and production staff
  - value and be open to, the opinions of others
  - work as part of a team
  - use active listening techniques
  - negotiate
- planning and organising skills to prepare and consult on a human capital development plan
- problem-solving, initiative and enterprise skills to:
  - evaluate talent and human capital requirements
  - undertake integrative thinking
  - conceptualise and synthesise complex concepts

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REQUIRED SKILLS AND KNOWLEDGE
• self-management and learning skills to maintain records on talent and human capital for a work group or operational area • technology skills to complete online research or data collection, and to develop and monitor human capital value using basic computer applications.
Required knowledge
• communication processes and methods • data collection methods • human capital audit and assessment • human capital development planning methodologies • methods to value human capital • organisational knowledge assets and capital reporting processes • relationship of human capital to knowledge management and reporting • relevant legislation, codes and by-laws that affect business operations, especially in regard to occupational health and safety (OHS) and environmental issues, equal opportunity, industrial relations and anti-discrimination.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • accurate assessment of human capital value in an organisation through human capital analysis and measurement • documentation relating to data collection, and analysis of human capital and relationship to an organisation's knowledge management and human capital strategy • documentary evidence of human capital audit and production of a talent development plan • input from a wide range of sources providing evidence in respect to a broad range of activities and situations • knowledge of human capital audit and assessment.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • competence is consistently demonstrated over time, and over a range and variety of situations • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • completion of applied projects or learning activities - such as examining the relationship between human capital and human resource development; knowledge and organisational learning; talent attraction and development; and human capital and organisational agility • completion of an action research project isolating the relationship of human capital to an organisation's intellectual and knowledge capital • direct observation of contextual application of skills • oral or written questioning to assess knowledge of methods to value human capital.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBFIM701A Manage financial resources • BSBLED702A Lead learning strategy implementation • PSPHR616A Manage performance management system • PSPMNGT614A Facilitate knowledge management.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Human capital is the:	• capital asset value of knowledge vested in the individual that can be deployed to maximise organisational and industry competitiveness
Capital asset value is the:	• determination of the value a business may derive from any stock of assets it owns, which can be deployed to create income, or from which interest and future value can be derived
Organisational requirements may include:	• access and equity principles and practices • business and performance plans • collaborative partnerships and arrangements • confidentiality requirements • defined resource parameters • ethical standards • goals, objectives, plans, systems and processes • legal and organisational policies, guidelines and requirements • OHS policies, procedures and programs • organisational sociocultural circumstances and issues (for example, within Indigenous organisations) • quality and continuous improvement processes and standards • quality assurance and procedures manuals • recording and reporting procedures

Organisation training needs profile may include:	• areas where staff may require further development linked to the organisation's goals and reflect:
	  • age profile
	  • composition - full-time, part-time, casual
	  • formal education and training backgrounds
	  • gender ratio
	  • language and cultural backgrounds
	  • occupational groups
	  • organisational change programs

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RANGE STATEMENT	
	• roster and shiftwork arrangements
Key stakeholders may include:	• customers • instructional designers • instructors • learners • management and staff • members of the public • peers • public agencies, especially regulators • suppliers and learning partners
Human capital needs analysis is the:	• determination of the gap between the human capital an individual, group, organisation or wider grouping (e.g. society or industry) requires as opposed to what is currently available

Information and data analysis will usually occur through deployment of:	• business technology
	• software applications able to assess human capital
	• analysis methods such as:
	  • data sampling
	  • feedback on results
	  • peer review
	  • qualitative and quantitative processes
	  • review of previous research
	  • statistical analysis

Options for the purposes of human capital development planning may include:	• availability of resources, such as financial resources, and information technology and systems • consultancy services • developing in-house capacity to meet identified needs • identifying training or assessment organisations to meet needs • identifying specific units of competency, Australian Qualifications Framework (AQF) qualifications or skill sets to meet needs • time lines • urgency
Talent concerns the:	• total potential an individual brings to an organisation within both current and future

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RANGE STATEMENT	
	contexts
Capacity includes:	• all innate and explicit competencies and capabilities able to be deployed to achieve desired outcomes in both current and future contexts

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Learning and Development

Co-requisite units

Co-requisite units		

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BSBLEG301A Apply knowledge of the legal system to complete tasks

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to complete a range of common legal administrative duties and the legal system that is required to carry them out. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who provide services to support legal practitioners, while under supervision. This unit underpins all units of competency in the Legal Services stream. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify the main roles and responsibilities of key bodies in the legal system	1.1. Identify the functions of the ***courts***, ***regulatory bodies and other legal service providers*** 1.2. Identify the roles of ***key personnel in the legal industry*** 1.3. Explain and apply practical implications of ***relevant legal practice legislation*** in regard to own activities 1.4. Research identified gaps in knowledge
2. Identify key personnel/sections within a legal firm and their functions, to complete routine administrative tasks	2.1. Ensure the ***key functions*** of ***a firm*** are identified and can be explained 2.2. Identify the ***key functions of all personnel/sections*** within a firm 2.3. Identify ***personnel responsible for authorisation of specific matters*** (eg. partner for authorising movement of funds in trust accounts) 2.4. Use the correct names of personnel/sections in administrative tasks according to ***a firm's policies and procedures***

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ELEMENT	PERFORMANCE CRITERIA
3. Produce and despatch legal documentation	3.1. Ensure purpose of ***document*/*form***, and the stage of the legal process to which it relates, can be explained 3.2. Access relevant information from the client file 3.3. Access ***precedent*** from firm's ***bank*** of forms/routine documentation or draft document according to ***firm's procedures*** 3.4. Attach file/matter number to all relevant documentation 3.5. Self-check ***document*/*form*** for accuracy and present it to the legal practitioner, within agreed timelines 3.6. Organise self or other to despatch document in the ***appropriate manner*** 3.7. Document all activities, actions and outcomes and record time as required 3.8. File documentation correctly
4. Organise self or other to apply for certificates	4.1. Arrange, document/record timelines with designated person 4.2. Identify and locate ***supplier of certificate*** 4.3. Identify and advise applicable fees, taxes and rebates to client, if appropriate 4.4. Organise self or other to apply for ***certificate*** using appropriate ***application*** forms and processes 4.5. Obtain record of ***application*** as appropriate 4.6. Facilitate legal practitioner's review of self or other's work 4.7. Organise self or other to pursue appropriate follow-up action if ***certificates*** are not received on time or further information is required
5. Use court etiquette appropriate to the various courts	5.1. Use the appropriate manner of entering into and departing from the courts/tribunals 5.2. Use the appropriate manner of addressing the courts/tribunals 5.3. Use relevant legal language where appropriate 5.4. Identify and research gaps in knowledge of ***court etiquette***

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to read and interpret documents/forms; follow sequenced written instructions; use appropriate legal terminology and sentence structures; display awareness of purpose and context of documents
- organisational skills to select and apply the procedures and strategies needed to perform a range of tasks, eg. legal forms and enclosures; and to undertake tasks concurrently
- proofreading skills
- research skills to identify gaps in knowledge and search and assemble relevant information
- communication skills to listen and question to clarify information; explain legal terminology to others; modify language to meet audience requirements; and consult where necessary with team members and clients
- numeracy skills to use a combination of oral and written mathematical and general language for record keeping purposes
- technology skills to use a range of software applications, electronic mail and internet.

Required knowledge

- scope of legal practitioner/support role and own responsibilities and obligations to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s)
- firm's policies and procedures
- accepted codes of conduct including those relating to:
- privacy and confidentiality
- use of company property
- duty of care
- ethical behaviour
- non-discriminatory practice
- conflict of interest
- compliance with reasonable direction
- legal terminology in relation to the area of law and the relevant legal process
- purpose of a range of certificates, documents and forms in relation to the area of law
- authorised 'signing parties'.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • accurately explaining relevant legal terminology in simple terms and using it correctly where appropriate • applying knowledge of the purpose of different types of documents/forms to read and interpret client's file and select appropriate information for inclusion • correctly preparing a range of relevant documents/ forms for lodgement or delivery in accordance with firm's procedures, relevant timelines and legislative requirements • accurately referring tokey personnel/sections of a firm according to their functions in all administrative tasks, written information and when responding to enquiries • applying correct processes, as designated by supplier, for the lodgement and receipt of certificates.

Context of and specific resources for assessment	Assessment must ensure:
	• wherever possible the context is a real or simulated workplace
	• access to workplace manuals and reference materials such as company policy, procedural manuals and checklists
	• access to list of relevant sources of documentation and sample forms
	• access to background information on courts, their jurisdiction and behavioural requirements
	• access to appropriate technology such as computers with relevant software
	• access to appropriate texts and access to person's with expert knowledge such as legal practitioners
	• access to appropriate legislation and regulations relevant to common legal matters, such as that accessible via:
	  • http://www.law.gov.au
	  • http://www.ag.gov.au

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EVIDENCE GUIDE	
	• http://www.austlii.edu.au/ • http://www.australia.gov.au/states-territories • http://www.act.gov.au • http://www.nsw.gov.au • http://www.nt.gov.au • http://www.qld.gov.au • http://www.sa.gov.au • http://www.tas.gov.au • http://www.vic.gov.au • http://www.wa.gov.au
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • questioning (oral or written) • review of testimony from team members, colleagues, supervisors or managers • tests of knowledge on relevant legislation, rules, regulations, codes of practice and research resources.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other legal services administration or general administration units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and

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RANGE STATEMENT	
regional contexts) may also be included.	
Courts**, **regulatory bodies and other legal service providers may include:	• County Court • Federal Court • Industrial Relations Court • Family Court • Supreme Court • Magistrates Court • Civil Registry Courts • State and Commonwealth Administrative Appeals Tribunal • Registrar of Probates • Liquor Licensing Commission • others not included in this listing
Key personnel in the legal industry may include:	• Barristers • Coroners • Crown Prosecutor • Crown Solicitor • Director of Public Prosecutions • Judges • Judges' associates • Magistrates • public defenders • public solicitors • solicitors • solicitor for public prosecutions • paralegals • legal secretaries • partner • managing partner • legal practice manager • law clerk • Queen's counsel • process server • authorised signing parties • other key personal in the legal industry not included in this listing.
Relevant legal practice legislation requirements may relate to:	• relevant State/Territory/Commonwealth legislation (eg. Legal Practice Act, The Judiciary Act) • schedules of fees and duties payable

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RANGE STATEMENT	
	• the area of law • the client and a firm (eg. Consumer Credit Code, Privacy Act, secrecy laws, Codes of Practice) • trust accounting • other Commonwealth, state/territory and/or local legislations, rules, regulations and/or codes of practice not included in this listing.
Key functions of a firm may include:	• commercial law • corporate law • criminal law • family law • industrial relations/employment law • litigation • property law • services in a specific area of law such as: • tax law • wills and probate • a range of legal services in specific settings such as: • Community Legal Centres • Government Solicitor's offices • Legal Aid Commissions • legal departments in large businesses • paralegal agencies (debt recovery, conveyancing) • private law firms (large, medium and small) • other areas of law not included in this listing
Key functions of personnel/departments may include:	• accounts • catering • financial management • human resources • information technology • library/information services • mail room • marketing • reception • specialised areas of law.
Personnel responsible for authorisation of specific matters	• business manager • lawyer

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RANGE STATEMENT	
may include:	• legal practice manager • partner • supervisor • teacher/trainer • work colleague • other personnel not included in this listing.
A ***firm's policies and procedures*** may include:	• accessing files • checklists • contingencies • core values • emergency procedures • firm charter • information sources • information specific to the firm • initiation of files • on-line information manuals • privacy • procedure manual • professional conduct code • recording information • security/confidentiality procedures • telephone protocol • training guides • updating files • verifying and authorising information.
Documents*/*forms may include:	• agreements • briefs • emails • internal correspondence • letters • memorandums of law • opinion letters • pleadings • precedents • registered legal instruments • transcripts from supervisor's notes.
Requirements for ***documents*/*forms*** may include:	• appropriate use of letterhead • correct line spacing • correct margins • correct use of reference

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RANGE STATEMENT	
	• dual column system • list of enclosures • paragraph numbering • placing of headings • presence/absence of a back sheet • presence/absence of a cover sheet • specific sign off clauses • usage of keycaps and font features • use of document footers.
Precedents relevant to the particular area of law may include:	• a firm's templates • agreements • contracts • court documents • leases • letter confirming client's instructions and rights • mortgages • standard letters • transfer of shares • wills • other precedents not included in this listing.
The precedent ***bank*** may be:	• external • in-house • on-line • stored pre-printed forms.
Documents may be despatched via:	• courier • email • fax • hand delivery • pick up by client • post AUSDOC.
Supplier of certificates may include:	• clients • contracted supplier • local government agencies • other law firms • State and Federal government agencies.
Certificates may include:	• birth • business names • citizenship

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RANGE STATEMENT	
	• death • incorporation • marriage • rate and planning certificates • registration of business • title • trademark registration.
Certificates may be requested:	• by letter • in person • on-line • via fax • via telephone.
Documentation for ***application*** may include:	• application for reservation of a name • articles of association • memorandum of association.
Court etiquette may include:	• acknowledging the Judge as he/she enters the court/tribunal at commencement of proceedings • acknowledging the Judge as he/she leaves the court/tribunal at the conclusion/adjournment of proceedings • behaving appropriately when entering or leaving the court/tribunal during proceedings • not speaking in the court/tribunal unless required to do so • remaining standing until the Judge is seated • using the appropriate form of address for a Judge or a Magistrate.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Legal Services Administration

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Co-requisite units

Co-requisite units		

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BSBLEG302A Carry out search of the public record

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to complete a search of the public record. This involves planning and conducting the search, and obtaining and delivering the information according to instructions. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who provide services to support legal practitioners, while under supervision. This unit underpins all units of competency in the Legal Services stream. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Plan search	1.1. Arrange ***timelines*** for completing search and plan work 1.2. Identify appropriate ***information sources*** for completing the search and identify procedure for obtaining information from sources and clarify if necessary
2. Conduct search	2.1. Access and complete appropriate ***search request*** form accurately 2.2. Prepare monies to pay for search if necessary 2.3. Organise self or other to lodge ***search request*** appropriate person/official at correct ***search location*** 2.4. Obtain ***record of lodgement***
3. Receive outcome of search	3.1. Arrange process of obtaining information with the appropriate person/official 3.2. Organise self or other to collect information from external agency in the arranged manner

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ELEMENT	PERFORMANCE CRITERIA
	3.3. File all records of expense 3.4. Check information to see that it meets identified needs and take appropriate follow-up action with assistance if necessary
4. Deliver information	4.1. Deliver information intact to ***designated person*** 4.2. Identify and resolve ***difficulties*** within timelines 4.3. Document all activities, actions and outcomes and record time

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to listen and question to clarify information; explain legal terminology to others; and consult where necessary with team members and clients
- literacy skills to follow legal procedures; follow sequenced written instructions involving legal terminology; lodge requests and provide clear and specific written instructions about information required
- research skills to conduct searches such as matching, key word searches, and locate specific information from a range of sources such as libraries, internet, government information services
- numeracy skills to use a combination of oral and written mathematical and general language record keeping purposes and in relation to search fees
- organisational skills to select and apply the procedures and strategies needed to perform a range of tasks; and to manage tasks within specified timelines
- technology skills to use a range of software, on-line applications and organisational information systems.

Required knowledge

- scope of legal practitioner/support role and own responsibilities and obligations to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s)
- firm's policies and procedures
- accepted codes of conduct including those relating to:
- privacy and confidentiality
- use of company property
- duty of care

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REQUIRED SKILLS AND KNOWLEDGE
• ethical behaviour • non-discriminatory practice • conflict of interest • compliance with reasonable direction • legal terminology in relation to the area of law and the relevant legal process • location and appropriate search procedures of relevant search sources, including on-line information locations • standard problems and resolutions in the sourcing and delivery of information • roles and responsibilities of internal and relevant external individuals/authorities.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • accurately searching and appropriately accessing a variety of information sources to meet identified needs • giving clear and sufficient instruction to others and providing adequate explanation where necessary • maintaining detailed file notes at each step of the search process, including a record of lodgement • proactively consulting the legal practitioner or supervisor where difficulties can not be resolved through standard procedures • preparing monies to pay for searches if necessary and maintaining records of all activities, actions, outcomes, time and costs in accordance with firm's policies and procedures.
Context of and specific resources for assessment	Assessment must ensure: • wherever possible the context is a real or simulated workplace • access to workplace manuals and reference materials such as company policy, procedural manuals and

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EVIDENCE GUIDE	

	checklists
	• access to list of relevant sources of documentation and sample forms
	• access to background information on courts, their jurisdiction and behavioural requirements
	• access to appropriate technology such as computers with relevant software
	• access to appropriate texts and access to person's with expert knowledge such as legal practitioners
	• access to appropriate legislation and regulations relevant to common legal matters, such as that accessible via:
	  • http://www.law.gov.au
	  • http://www.ag.gov.au
	  • http://www.austlii.edu.au/
	  • http://www.australia.gov.au/states-territories
	  • http://www.act.gov.au
	  • http://www.nsw.gov.au
	  • http://www.nt.gov.au
	  • http://www.qld.gov.au
	  • http://www.sa.gov.au
	  • http://www.tas.gov.au
	  • http://www.vic.gov.au
	  • http://www.wa.gov.au

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • questioning (oral or written) • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers • tests of knowledge on relevant legislation, rules, regulations, codes of practice and research resources.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLEG301A Apply knowledge of the legal system to complete tasks • other legal services administration or general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Timelines may be contingent upon:	• case issues • changes in legislation • client needs • court deadlines • legal practitioner's workload • significant dates such as new year, end of financial year.
The ***information source*** may be:	• external agency • on-line, including: • at agency • land data • law point • on-line services • another law firm.
Information sources may include:	• Australian Securities Commission information • Business Licence Centre • Commonwealth and State Freedom of Information Acts • Consumer Affairs records • credit files (in accordance with Privacy Act) • databases

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RANGE STATEMENT	
	• electoral rolls • motor vehicle registrations • public telephone directories • rates searches • State and Supreme Courts libraries • Titles Office/council records • other sources not included in this listing.
The ***search request*** may vary according to:	• the information required before the search can be carried out • the search location • whether information can be requested by email or fax or on-line • whether specific form is required.
Search location may include:	• Australian Securities Commission • Court/Institutional library • Local/Regional/State/Federal government departments • Statutory bodies • Titles Office.
Record of lodgement may include:	• copy of request • email confirmation • number • receipt • stamped copy of request.
Designated person may include:	• external client • external official • lawyer • legal practice manager • partner • supervisor • work colleague.
Difficulties in meeting timelines may relate to:	• alterations to instructions • available resources • backlog at supplier's end • client needs • liaising with others • technical difficulties.
A firm's policies and procedures may include:	• charging of search expenses • contingencies in terms of inadequate monies, unavailable information

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RANGE STATEMENT	
	• handling monies • information sources • office procedure manual • recording information • security/confidentiality/ privacy procedures.
Legislative requirements may relate to:	• Legal Practice Act, The Judiciary Act • relevant State/Territory/Commonwealth legislation • the client and a firm (eg. Consumer Credit Code, Privacy Act, secrecy laws, Codes of Practice) • schedule of fees and duties payable • accessing information under the Freedom of Information Act • other Commonwealth, state/territory and/or local legislations, rules, regulations and/or codes of practice not included in this listing.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Legal Services Administration

Co-requisite units

Co-requisite units		

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BSBLEG303A Deliver court documentation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to organise court documents for delivery, planning a schedule of delivery, delivering documents to the appropriate courts and returning proof of document lodgement. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who provide services to support legal practitioners, while under supervision. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Organise self or other to copy and collate court/tribunal documents	1.1. Identify documents for the same ***courts***/***tribunals*** 1.2. Organise self or other to copy and collate documents according to ***court requirements*** and ***a firm's policies and procedures*** 1.3. Attach file/matter number to copies of all relevant documents where appropriate 1.4. Appropriately file copies of all ***documents to be delivered***
2. Plan court/tribunal delivery schedule	2.1. Establish times of delivery to ensure court/tribunal timelines are met 2.2. Selected appropriate ***delivery method*** 2.3. Prepare monies for court filing fee and record disbursement appropriately
3. Organise self or other to deliver documents	3.1. Transport documents securely to court/tribunal 3.2. Hand over documents and monies if necessary for court filing fees to ***appropriate court official*** 3.3. Seek and record information regarding deficiency from court official if documents are deficient and cannot be lodged, 3.4. Collect and file ***proof of lodgements*** and any

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ELEMENT	PERFORMANCE CRITERIA
	associated documents appropriately 3.5. Appropriately resolve ***difficulties with lodgement*** or refer to ***designated person*** as appropriate

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to issue and follow clear, sequenced verbal instructions; and clarify information by questioning as necessary • literacy skills to follow legal procedures; issue and follow written instructions about routine legal procedures; and complete routine forms about legal matters according to established workplace procedures • numeracy skills to apply knowledge of mathematical concepts in relation to court filing fees and record keeping; adhere to deadlines; and copy and collate documents • organisational skills to plan and prioritise own and other's activities and time • problem solving skills to plan appropriate and efficient methods of delivery with regards to deadlines • teamwork skills to define purposes and objectives to be achieved by working with others and negotiate task distribution with other members of the group.
Required knowledge
• scope of legal practitioner/support role and own responsibilities and obligations to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s) • firm's policies and procedures • accepted codes of conduct including those relating to: • privacy and confidentiality • use of company property • duty of care • ethical behaviour • non-discriminatory practice • conflict of interest • compliance with reasonable direction • overview knowledge of relevant; court processes, current legislation, legal processes and required documentation

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • correctly collating and lodging documentation for each court, with correct number of copies, signatures if necessary, and relevant attachments according to firm's policies and procedures and the court's requirements • maintaining communication with designated person/s regarding actions, activities and outcomes and, where difficulties arise, contacting them if standard resolutions are not applicable • planning court delivery schedule to accommodate agreed timelines, closing times of courts and the number of documents to be lodged • preparing monies for court filing fees if necessary and maintaining records of all activities, actions, outcomes, time and costs in accordance with firm's policies and procedures.
Context of and specific resources for assessment	Assessment must ensure: • wherever possible the context is a real or simulated workplace • access to workplace manuals and reference materials such as company policy, procedural manuals and checklists • access to list of relevant sources of documentation and sample forms • access to background information on courts, their jurisdiction and behavioural requirements • access to appropriate technology such as computers with relevant software • access to appropriate texts and access to person's with expert knowledge such as legal practitioners • access to appropriate legislation and regulations relevant to common legal matters, such as that

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EVIDENCE GUIDE	
	accessible via: • http://www.law.gov.au • http://www.ag.gov.au • http://www.austlii.edu.au/ • http://www.australia.gov.au/states-territories • http://www.act.gov.au • http://www.nsw.gov.au • http://www.nt.gov.au • http://www.qld.gov.au • http://www.sa.gov.au • http://www.tas.gov.au • http://www.vic.gov.au • http://www.wa.gov.au
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • demonstration of techniques in a workplace or simulated environment • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of performance in role plays • questioning (oral or written) • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers • tests of knowledge on relevant legislation, rules, regulations, codes of practice and research resources.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLEG301A Apply knowledge of the legal system to complete tasks • other legal services administration or general administration units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Courts*/*tribunals may include:	• Children's Court • Coroner's court • Courts of Petty Sessions • District/County Court • Equal Opportunity Tribunal • Family Court • Federal Court • High Court • Industrial Relations Court • Magistrates Court • Small Claims Tribunal • State and Commonwealth Administrative Appeals Tribunals • Supreme Court • other courts/tribunals not included in this listing
Court requirements may include:	• back cover sheet • colour and weight of paper • front cover sheet • margins • nature of binding • paper size • ribbon
A firm's policies and procedures may include:	• contingencies • delivering a firm's business • emergency procedures • information specific to the firm • keeping files up to date • office procedure manual • privacy/security/confidentiality procedures • recording information • time recording procedures • transferring monies

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RANGE STATEMENT	
	• verifying and authorising information
Documents to be delivered may include:	• affidavits • briefs • exhibits • expert reports • notices • pleading documents • witness statements • writs
Delivery method may include:	• AUSDOC • courier • personal service • post
Appropriate court official may include:	• bailiff • court clerk • sheriff
Proof of lodgement may involve:	• affidavit of services • receipt • signature of court official
Difficulties with lodgement may relate to:	• failure to meet court/case deadlines • incomplete forms and documents • incorrect address • insufficient monies
Designated person may include:	• lawyer • partner • supervisor • teacher/trainer

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Legal Services Administration

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Co-requisite units

Co-requisite units		

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BSBLEG304A Apply the principles of confidentiality and security within the legal environment

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to use ethical behaviour when dealing with sensitive and confidential information in a legal environment. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who provide services to support legal practitioners, while under supervision. This unit underpins all units of competency in the Legal Services stream. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Work within accepted codes of conduct	1.1. Submit work for review and approval by the legal practitioner who delegated the task/s 1.2. Keep paperwork up to date and forward reports on the progress of matter/s to clients regularly according to instructions and ***relevant legislation*** 1.3. Ensure contact with the opposing party in legal disputes occurs only under the specific direction of the legal practitioner responsible for the matter 1.4. Promptly communicate ***conflict of interest*** or potential conflict of interest in a legal matter to the legal practitioner responsible for the matter 1.5. Treat clients and fellow workers with respect 1.6. Take care to behave with honesty and integrity at all times 1.7. Direct trust account monies to legal practitioner for receipt
2. Follow confidentiality procedures	2.1. Assess information with regard to what is and what is not ***disclosable*** 2.2. Use discretion and judgement in all communications 2.3. Discuss client-related matters only within the confines of the practice and with appropriate

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ELEMENT	PERFORMANCE CRITERIA
	personnel
3. Follow security procedures	3.1. Appropriately store and secure file related information, including ***electronically stored information***
	3.2. Hold discussions relating to client matters in a private location
	3.3. Ensure all documents/exhibits relating to a file are locked away securely after use according to ***a firm's policies and procedures***
	3.4. Ensure all materials required by legislation to be stored for certain periods of time are clearly labelled and stored securely according to a firm's policies and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to listen to clear, sequenced instructions; and use strategies to confirm, repair or clarify understanding of terms and context
- literacy skills to interpret, classify and evaluate information
- ability to apply judgement in terms of identifying potential conflict of interest
- organisational skills to comply with statutory regulations concerning security of records and keep clients up to date on file matters.

Required knowledge

- scope of legal practitioner/support role and own responsibilities and obligations to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s)
- firm's policies and procedures
- accepted codes of conduct including those relating to:
- privacy and confidentiality
- use of company property
- duty of care
- ethical behaviour
- non-discriminatory practice
- conflict of interest

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REQUIRED SKILLS AND KNOWLEDGE
• compliance with reasonable direction • overview knowledge of relevant; court processes, current legislation, legal processes and required documentation

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • knowledge of own scope of responsibility and roles and responsibilities of relevant others within the firm • proactively applying the relevant state's Code of Conduct and Legal Practice Act, The Judicial Act to ensure all work is performed with honesty and integrity • identifying and applying standard resolutions to breaches of confidentiality, security and conduct by self and others within the firm. • providing clear, relevant and correct assistance and advice to co-workers where appropriate • handling, storing and securing allelectronic and paper-based confidential information according to firm's policies and procedures • consistently seeking clarification from appropriate sources where the level of confidentiality required in a situation is unclear.
Context of and specific resources for assessment	Assessment must ensure: • wherever possible the context is a real or simulated workplace • access to workplace manuals and reference materials such as company policy, procedural manuals and checklists • access to list of relevant sources of documentation and sample forms • access to background information on courts, their

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EVIDENCE GUIDE	

	jurisdiction and behavioural requirements
	• access to appropriate technology such as computers with relevant software
	• access to appropriate texts and access to person's with expert knowledge such as legal practitioners
	• access to appropriate legislation and regulations relevant to common legal matters, such as that accessible via:
	  • http://www.law.gov.au
	  • http://www.ag.gov.au
	  • http://www.austlii.edu.au/
	  • http://www.australia.gov.au/states-territories
	  • http://www.act.gov.au
	  • http://www.nsw.gov.au
	  • http://www.nt.gov.au
	  • http://www.qld.gov.au
	  • http://www.sa.gov.au
	  • http://www.tas.gov.au
	  • http://www.vic.gov.au
	  • http://www.wa.gov.au

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques in a workplace or simulated environment • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • questioning (oral or written) • review of testimony from team members, colleagues, supervisors or managers • tests of knowledge on relevant legislation, rules, regulations, codes of practice and research resources.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLEG301A Apply knowledge of the legal system to complete tasks

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EVIDENCE GUIDE	
	• other legal services administration or general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Codes of conduct may include:	• compliance with reasonable direction • conflict of interest • duty of care • ethical behaviours • maintaining confidentiality • non-discriminatory practice • privacy • receiving and dispersing monies • use of company property.
Relevant legislation may include:	• State/Territory/Commonwealth legislation • legislation related to the client and a firm (eg. Consumer Credit Code, Privacy Act, secrecy laws, Codes of Practice) • schedule of fees and duties payable • other acts not included in this listing
Conflict of interest may exist where:	• a law firm, legal practitioner or support person some time in the past represented a client who is now on the other side in another case • a legal practitioner and client are in business together • a legal practitioner or support person has a personal, financial or other interest in a case • a legal practitioner or support person is a witness in a case • a legal practitioner simultaneously represents two clients whose interests are adverse to one another

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RANGE STATEMENT	
	• the legal stance of one client is detrimental to the business activities of another client.
Non-***disclosable*** information may include:	• addresses of clients, witnesses or staff • details about the firm itself • exhibits • fact that the client has consulted the firm • financial information • firm's client database • information relating to a client's legal matter • names of clients, witnesses or staff • nature of client's legal matter • passwords or security procedures • telephone numbers of clients, witnesses or staff • trust account information • whereabouts of client/witnesses • witness statements.
Electronically stored information may be:	• on audio-cassette • on computer hard-drive or floppy disk • on voice mail • on-line (email or web).
A firm's policies and procedures may include:	• charging of search expenses • contingencies in terms of inadequate monies, unavailable information • handling monies • information sources • office procedure manual • recording information • security/confidentiality/ privacy procedures.

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Administration - Legal Services Administration

Co-requisite units

Co-requisite units		

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BSBLEG305A Use legal terminology in order to carry out tasks

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to understand and use legal terminology in order to undertake tasks. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who provide services to support legal practitioners, while under supervision. This unit underpins all units of competency in the Legal Services stream. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Use appropriate legal terminology in written and oral communication with internal and external parties	1.1. Use appropriate ***legal terminology*** in both written and oral communication with internal and external parties 1.2. Spell and pronounce ***legal terminology*** correctly and use in appropriate context when completing ***work tasks***
2. Extend understanding of legal terminology	2.1. Identify gaps in knowledge and seek ***clarification*** through appropriate source or ***designated person*** 2.2. Identify and use abbreviations for commonly used legal terms and associated processes where appropriate 2.3. Ensure questions relating to ***legal terminology*** can be answered and terms defined

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills
• communication skills to accurately pronounce legal terminology; follow oral, sequenced instructions involving legal terminology ; and apply strategies to confirm, repair or clarify understanding of terms and context • literacy skills to read and interpret legal documents; understand and use vocabulary for a specific purpose; and follow written, sequenced instructions involving legal terminology • research skills to clarify intended meaning and legal context of instructions or legal terminology; and increase own knowledge of legal terminology.
Required knowledge
• scope of legal practitioner/support role and own responsibilities and obligations to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s) • firm's policies and procedures • accepted codes of conduct including those relating to: • privacy and confidentiality • use of company property • duty of care • ethical behaviour • non-discriminatory practice • conflict of interest • compliance with reasonable direction • overview knowledge of relevant; court processes, current legislation, legal processes and required documentation

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • proactively applying research and communication skills to increase own knowledge of legal terminology

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EVIDENCE GUIDE	
	• consistently seeking clarification from appropriate person/source of information when instructions are unclear or to locate missing information • competently carrying out instructions containing commonly used legal terminology and abbreviations • accurately identifying and communicating the legal and financial consequences of misusing legal terminology • using simple, non-legal language to explain legal terminology and processes to others • using legal terminology appropriate to the situation when completing delegated administrative tasks.

Context of and specific resources for assessment	Assessment must ensure:
	• wherever possible the context is a real or simulated workplace
	• access to workplace manuals and reference materials such as company policy, procedural manuals and checklists
	• access to list of relevant sources of documentation and sample forms
	• access to background information on courts, their jurisdiction and behavioural requirements
	• access to appropriate technology such as computers with relevant software
	• access to appropriate texts and access to person's with expert knowledge such as legal practitioners
	• access to appropriate legislation and regulations relevant to common legal matters, such as that accessible via:
	  • http://www.law.gov.au
	  • http://www.ag.gov.au
	  • http://www.austlii.edu.au/
	  • http://www.australia.gov.au/states-territories
	  • http://www.act.gov.au
	  • http://www.nsw.gov.au
	  • http://www.nt.gov.au
	  • http://www.qld.gov.au
	  • http://www.sa.gov.au
	  • http://www.tas.gov.au
	  • http://www.vic.gov.au
	  • http://www.wa.gov.au

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques in a workplace or simulated environment • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • questioning (oral or written) • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers • tests of knowledge on relevant legislation, rules, regulations, codes of practice and research resources.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLEG301A Apply knowledge of the legal system to complete tasks • other legal services administration or general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Commonly used ***legal terminology*** may relate to:	• courts and tribunals • legal documentation • legal personnel • legal procedures

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RANGE STATEMENT	
	• legislation and regulations.
Commonly used ***legal terminology may*** vary according to:	• a particular legal procedure • legal setting eg. community legal work, Crown Solicitor's Office • the area of law • the jurisdiction.
Work tasks may include:	• contacting external parties • drafting letters in response to queries • filing • maintenance/update of clients' files, eg. file notes, certificates, results of public search, correspondence with a barrister • organising payments • preparing accounts • preparing court documentation • producing office memos • taking and forwarding messages • typing legal practitioner's notes.
Clarification regarding commonly used legal terminology may be sought from:	• designated person/s • glossary of commonly use legal terminology and processes • legal dictionary • relevant handbook eg. Legal Secretary's Handbook.
Designated person may include:	• lawyer • legal practice manager • partner • supervisor • work colleague.
The area of law may include:	• commercial law • corporate law • criminal law • family law • industrial relations • litigation • property law • tax law • wills and probate • other areas of law not included in this listing

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Legal Services Administration

Co-requisite units

Co-requisite units		

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BSBLEG306A Maintain records for time and disbursements in a legal practice

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to maintain time records and enter disbursements incurred. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who provide services to support legal practitioners, while under supervision. This unit underpins all units of competency in the Legal Services stream. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Record fee earner time	1.1. Access ***time sheets*** submitted by ***fee-earners*** 1.2. Organise self or other to enter time recording onto the accounting system against the relevant client or client matter file, or other relevant codes eg. training, marketing 1.3. Note irregularities and/or uncertainties and follow standard resolution procedures or alert ***designated person*** as appropriate 1.4. Make entries within agreed timelines
2. Enter disbursements incurred	2.1. Record details of ***disbursements*** accurately against the relevant client or client master file according to ***a firm's policies and procedures*** 2.2. Note irregularities and/or uncertainties and ensure standard resolution procedures are followed or alert designated person as appropriate 2.3. Attach file/master number to all ***relevant documentation*** and file such documentation appropriately

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- numeracy skills to apply combination of oral and written mathematical and general language for the record keeping process
- communication skills to listen to clear, sequenced instructions; clarify information by questioning as necessary; and consult where necessary with team members and clients
- technology skills to use a range of software applications
- literacy skills to follows a firm's legal procedures and sequenced, written instructions
- problem-solving skills to apply resolution procedures to standard problems
- organisational skills to select and apply the procedures and strategies needed to perform a range of tasks within designated time lines.

Required knowledge

- scope of legal practitioner/support role and own responsibilities and obligations to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s)
- firm's policies and procedures
- accepted codes of conduct including those relating to:
- privacy and confidentiality
- use of company property
- duty of care
- ethical behaviour
- non-discriminatory practice
- conflict of interest
- compliance with reasonable direction
- overview knowledge of relevant; court processes, current legislation, legal processes and required documentation

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrating honesty and integrity in all financial dealings • accurately entering time recording and disbursements onto the accounting system in accordance with firm's policies and procedures • presenting relevant documentation to designated person/s for approval within agreed timelines • consistently handling and administering trust accounts in accordance with firm's policies and procedures and legislative requirements • applying standard procedures to resolve irregularities and/or uncertainties and/or alertingdesignated person/s as appropriate.

Context of and specific resources for assessment	Assessment must ensure:
	• wherever possible the context is a real or simulated workplace
	• access to workplace manuals and reference materials such as company policy, procedural manuals and checklists
	• access to list of relevant sources of documentation and sample forms
	• access to background information on courts, their jurisdiction and behavioural requirements
	• access to appropriate technology such as computers with relevant software
	• access to appropriate texts and access to person's with expert knowledge such as legal practitioners
	• access to appropriate legislation and regulations relevant to common legal matters, such as that accessible via:
	  • http://www.law.gov.au
	  • http://www.ag.gov.au
	  • http://www.austlii.edu.au/
	  • http://www.australia.gov.au/states-territories
	  • http://www.act.gov.au
	  • http://www.nsw.gov.au
	  • http://www.nt.gov.au
	  • http://www.qld.gov.au

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EVIDENCE GUIDE	
	• http://www.sa.gov.au • http://www.tas.gov.au • http://www.vic.gov.au • http://www.wa.gov.au
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of examples of records • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • questioning (oral or written) • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers • tests of knowledge on relevant legislation, rules, regulations, codes of practice and research resources.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLEG301A Apply knowledge of the legal system to complete tasks • other legal services administration or general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Time sheets may be:	• electronic • paper-based.

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RANGE STATEMENT	
Fee-earners may include:	• accountant • conveyancer • law clerk • paralegal • qualified legal practitioner.
Designated person may include:	• accountant • business manager • lawyer • legal practice manager • partner • supervisor • teacher/trainer.
Disbursements may include:	• cost of duty stamps • courier fees • court costs • filing fees • photocopying • postage • search fees • telephone charges • other disbursements as described by state/territory requirements
A ***firm's policies and procedures*** may include:	• accessing accounting system • availability of information • definition of disbursement and amount to charge • detailing disbursements • information specific to the firm • liaising with financial institutions • office procedure manual • recording information • security/confidentiality/privacy procedures • time recording procedures • verifying and authorising information.
Relevant documentation may relate to:	• exchange of information • financial transaction • public search of record • verbal communication with external parties.
Methods for maintaining records	• specialised electronic software packages eg. LAW 2000, BillBack, LawLedger

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RANGE STATEMENT	
for time and disbursements may include:	• standard books of account - trust account receipt book, cash book, cheque book, ledger, bank deposit book • timesheet.
The area of law may include:	• commercial law • corporate law • criminal law • family law • industrial relations • litigation • property law • tax law • wills and probate • other areas of law not included in this listing
Legislative requirements may relate to:	• Australian Taxation Office regulations • court scales in each State/Territory • definition of a disbursement • establishing a trust account • Governing Legal Practice Acts in each State/Territory • Law Society/Institute procedures in each State/Territory • relevant State/Territory/Commonwealth legislation • schedules of fees and duties payable • taxation and banking requirements • the area of law • the client and a firm (eg. Consumer Credit Code, Privacy Act, secrecy laws, Codes of Practice, common law and Statutory Duties of Care involving financial relationships) • Tort, Equity and Statute law • trust accounting regulations in each State/Territory.

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Administration - Legal Services Administration

Co-requisite units

Co-requisite units		

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BSBLEG308A Assist in prioritising and planning activities in a legal practice

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assist others (for example, Partner, Solicitor, Fee Earner, Human Resources Manager, External Client) to organise a legal schedule. This involves arranging appointments and other activities based upon court dates and required legislative timelines. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who provide services to support legal practitioners, while under supervision. This unit underpins all units of competency in the Legal Services stream. All aspects of legal practice may be subject to a range of legislation, rules, regulations and/or codes of practice relevant to different job roles and jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Record file related critical dates and times	1.1. Identify ***file related deadlines***
	1.2. Record file related deadlines according to a firm's policies and procedures
2. Make and record appointments on behalf of designated person	2.1. Establish and clarify priorities of ***designated person/s*** in discussion
	2.2. Ensure ***timelines*** for achievement of priorities are agreed and documented/recorded
	2.3. Arrange and/or re-arrange ***appointments*** to a time or date which is more convenient for parties involved
3. Assist designated person/s to prepare for critical dates	3.1. Check ***records*** daily for upcoming appointments and commitments
	3.2. Remind designated person/s of ***critical file dates***
	3.3. Prepare and distribute information meeting ***legislative requirements*** to the designated person/s

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ELEMENT	PERFORMANCE CRITERIA
	prior to critical dates 3.4. Monitor timelines regularly in consultation with designated person
4. Follow up outcomes of meetings or other activities	4.1. Plan and organise appropriate follow up actions and activities in conjunction with designated person and relevant parties 4.2. Update ***file notes*** according to a firm's policies and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to listen to clear sequenced instructions and note individual preferences regarding arrangements for group activity; apply questioning to clarify information; and discusses and confirm requirements and priorities of others • teamwork skills to clarify defined purposes and objectives to be achieved by working with others • literacy skills to follows a firm's legal procedures; and sequence writing with attention to organising principles of date, time, importance or file code according to organisation's requirements • numeracy skills to order and compare sets of dates using simple everyday data; adheres to deadlines; and keep accurate records • organisational skills to plan and prioritise own and other's activities and time • problem solving skills to negotiate task distribution with other members of the group; and select most efficient and appropriate times for appointments etc. • technology skills to use a range of software applications.
Required knowledge
• scope of legal practitioner/support role and own responsibilities and obligations to provide legal advice, complete or sign off on legal work and/or appear in court as described by relevant jurisdiction(s) • firm's policies and procedures • firm's administrative systems and files • accepted codes of conduct including those relating to: • privacy and confidentiality • use of company property

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REQUIRED SKILLS AND KNOWLEDGE
• duty of care • ethical behaviour • non-discriminatory practice • conflict of interest • compliance with reasonable direction

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstratingan understanding of the responsibility involved in making arrangements for others and the legal consequences of not meeting critical timelines • interacting courteously and efficiently with other parties when making, confirming, and changing appointments • applying organisational skills and firm's procedures to accurately and legibly diarise all relevant details of appointments and file deadlines and follow up as required • applying standard procedures to solve problems (such as double bookings or non-attendances) promptly and satisfactorily • creating and maintaining up-to-date, legible, accurate and accessible records of all activities and outcomes according to firm's policies and procedures.
Context of and specific resources for assessment	Assessment must ensure: • wherever possible the context is a real or simulated workplace • access to workplace manuals and reference materials such as company policy, procedural manuals and checklists • access to list of relevant sources of documentation and sample forms

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EVIDENCE GUIDE	

	• access to background information on courts, their jurisdiction and behavioural requirements
	• access to appropriate technology such as computers with relevant software
	• access to appropriate texts and access to person's with expert knowledge such as legal practitioners
	• access to appropriate legislation and regulations relevant to common legal matters, such as that accessible via:
	  • http://www.law.gov.au
	  • http://www.ag.gov.au
	  • http://www.austlii.edu.au/
	  • http://www.australia.gov.au/states-territories
	  • http://www.act.gov.au
	  • http://www.nsw.gov.au
	  • http://www.nt.gov.au
	  • http://www.qld.gov.au
	  • http://www.sa.gov.au
	  • http://www.tas.gov.au
	  • http://www.vic.gov.au
	  • http://www.wa.gov.au

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • questioning (oral or written) • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers • tests of knowledge on relevant legislation, rules, regulations, codes of practice and research resources.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLEG301A Apply knowledge of the legal system

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EVIDENCE GUIDE	
	to complete tasks • other legal services administration or general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
File related deadlines may include:	• court appearances • document lodgement cut off dates • legislated timelines • settlement dates • other file related deadlines not included in this listing.
Designated person may include:	• external client • lawyer • legal practice manager • partner • supervisor.
Difficulties in meeting ***timelines*** may relate to:	• available resources • client needs • court adjournments • failure of other parties/agencies to produce required materials on time • variations to contracts.
Appointments may be arranged:	• in response to continuing legal education requirements as designated by relevant Law Societies and Institutes • in response to new/existing client enquiry/request • to meet court requirements • to meet legal matter requirements • to meet the need for consulting experts.

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RANGE STATEMENT	

Records may include, but are not limited to:	• client's details may include:
	  • name
	  • telephone number
	  • type of matter
	• court details may include:
	  • date
	  • location
	  • matter
	  • time
	• dates on which follow-up actions are occur may include:
	  • payment of fees
	  • progress report to client
	• property settlement
	• other records not included in this listing.

Critical file dates may include:	• court appearances
	• court mentions
	• lodgement of documents
	• meetings with clients
	• meetings:
	  • external
	  • internal
	• property settlements
	• settlement of accounts
	• travel arrangements.

Legislative requirements may relate to:	• relevant State/Territory/Commonwealth legislation - their legal process time and action requirements eg. required amount of time serving notice, timeline for submission/exchange of documents and/or monies, number and type of meetings required between parties. • Governing legal practice Acts in each State/Territory • the client and a firm (eg. Consumer Credit Code, Privacy Act, secrecy laws, Codes of Practice, Common Law and Statutory Duties of Care involving financial relationships) • schedule of fees and duties payable • employee-employer agreements and legislation

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RANGE STATEMENT	
File notes may be stored:	• electronically • in date order • on a checklist/form • on a file note spike • on the computer • paper based • with client file.
File notes may include:	• date • discussion notes • file concerned • mode of attendance (eg. in person/telephone) • people involved • resulting activity, action outcome • time expended on matter.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Legal Services Administration

Co-requisite units

Co-requisite units		

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BSBLEG403B Maintain trust accounts

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to maintain trust monies related to specific files, under instruction of a legal practitioner. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who apply a broad knowledge of administration tasks in providing support in a legal context. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Check that trust funds are adequate	1.1. Check ***relevant sources*** for information regarding disbursements and costs 1.2. Calculate and reconcile estimated ***disbursements*** and costs with available trust funds 1.3. Notify instructing legal practitioner where there are inadequate available funds 1.4. Notify client that further funds are required, where necessary, according to ***organisation's policies and procedures***
2. Draw cheques against trust account	2.1. Complete appropriate requisition form 2.2. Gain authorisation from instructing legal practitioner according to organisation's policies and procedures 2.3. Inspect cheques for accuracy and correct account source 2.4. Organise instructing legal practitioner to verify and sign cheques 2.5. Keep accurate records of all file-related disbursements and costs
3. Prepare documentation upon completion of legal matter	3.1. Collate relevant information and documentation from file 3.2. Reconcile monies remaining in trust account 3.3. Promptly investigate discrepancies or irregularities

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ELEMENT	PERFORMANCE CRITERIA
	and take appropriate follow-up action

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication skills to:
  • follow and interpret instructions
  • provide clear and specific instructions about information required
• literacy skills to:
  • follow complex legal procedures
  • proofread documents to ensure accuracy and consistency of information
• numeracy skills to performbanking transaction calculations and reconciliations
• problem-solving skills to resolve discrepancies with accounts
• organisational skills to select and apply the procedures and strategies needed to perform a range of tasks within designated timelines

Required knowledge

• scope of own job role
• legal terminology in relation to trust accounting
• relevant Australian Taxation Office regulations, current legislation governing trust accounts, and legal processes
• required documentation for trust account transactions and security, confidentiality and privacy requirements
• statutory charges, taxes and other fees applicable to institutions
• accepted codes of practice relevant to the workplace, including those relating to:
  • privacy and confidentiality
  • use of company property
  • duty of care
  • ethical behaviour
  • non-discriminatory practice
  • conflict of interest
  • compliance with reasonable direction

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • comply with organisation's trust accounting procedures, and legislative and regulatory requirements • demonstrate honesty, integrity and accuracy in calculations and reconciliations • prepare accurate and compliant documentation • apply knowledge of codes of practice • resolve or appropriately refer discrepancies and irregularities.
Context of and specific resources for assessment	Assessment must ensure access to: • an actual workplace or simulated environment • workplace manuals and reference materials, such as company policies, procedural manuals and checklists • list of relevant sources of documentation and sample forms • background information on courts, their jurisdiction and behavioural requirements • appropriate technology, such as computers with relevant software • appropriate texts and people with expert knowledge, such as legal practitioners • appropriate legislation and regulations relevant to common legal matters.
Method of assessment	The following assessment methods are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of completed requisition form • review of records of file-related disbursements and costs • evaluation of reconciled trust account monies • oral or written questioning to assess knowledge of trust accounting principles and practices, within the limits of own responsibilities.
Guidance information for	Holistic assessment with other units relevant to the industry sector,

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EVIDENCE GUIDE	
assessment	workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant sources of information may include:	• bank statements • cheques • credit notes • delivery dockets • deposit books • information from open file • invoices and receipts • monies received into the trust account • petty cash book • petty cash vouchers • purchase requisitions and orders • transactions on the trust account.
Disbursements may include:	• cost of duty stamps • court costs • filing fees • photocopying • postage • telephone charges.
Organisation's policies and procedures may include:	• accessing accounting system • bank procedures and policies • following up discrepancies and irregularities • handling monies • information sources • keeping records of disbursements • legal bookkeeping • liaising with financial institutions

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RANGE STATEMENT	
	• notifying client when further funds are required • recording information • reporting to state law society/institute as required by law • security, confidentiality and privacy procedures • specific arrangements with banks as they apply to trust accounts • verifying and authorising information.

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - legal administration

Co-requisite units

Co-requisite units		

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BSBLEG413A Identify and apply the legal framework

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to research legal systems and jurisdictions within Australia. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who research legal systems within Australia. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify sources of law	1.1. Identify the ***main institutions*** of government in Australia 1.2. Research ***sources*** of Australian law 1.3. Assess rules for resolving conflicts of laws
2. Identify and analyse relationships between the Australian federal government and the states and territories	2.1. Identify ***legislative powers*** of the Australian federal government and limits on that power 2.2. Analyse the legislative powers of the states and territories 2.3. Evaluate the relationship between the legislative powers of the Australian federal government and the states and territories
3. Differentiate between civil and criminal proceedings	3.1. Identify and examine the differences in law and procedures between civil and criminal proceedings 3.2. Analyse the findings and determine which court would hear particular cases
4. Examine elements of the adversary system of trial	4.1. Identify main features of the adversary system of trial 4.2. Evaluate these features and determine how they apply in the context of the legal environment
5. Examine elements of precedent	5.1. Identify the main features of the principles of precedent 5.2. Analyse how precedent is applied in the context of a

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ELEMENT	PERFORMANCE CRITERIA
	legal environment 5.3. Examine and document the outcomes of precedent
6. Examine legislation	6.1. Examine principles for reading and interpreting legislation 6.2. Apply principles for reading and interpreting legislation in the context of a legal environment

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• computer skills to access and document information • literacy skills to read and interpret written material • research and data collection skills to identify the characteristics, similarities and differences of Australian institutions, types of proceedings and trial procedures • analytical skills to investigate and compare legal institutions
Required knowledge
• institutions and main features of the Australian legal system • legal terminology in relation to areas of the practice of the law and relevant legal processes • methods used to identify appropriate information about sources of Australian law • scope of responsibilities in the context of legal framework

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence	Evidence of the ability to:

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EVIDENCE GUIDE	
required to demonstrate competency in this unit	• explain the differences between Australian law making institutions • identify appropriate institutions to hear civil versus criminal proceedings • demonstrate how the adversarial system of trial operates • demonstrate the application and outcomes of the principles of precedent • read and interpret legislation.
Context of and specific resources for assessment	Assessment must ensure access to: • an actual workplace or simulated environment • appropriate legislation and regulations relevant to common legal matters • relevant sources of documentation • background information on courts, their jurisdiction and behavioural requirements • appropriate technology, such as computers with relevant software • appropriate resources and people with expert knowledge.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of presentations about Australian legal institutions • review of analysis of the legislative powers of the states and territories • oral or written questioning to assess knowledge of the similarities and differences between Australian legal institutions, proceeding types and adversarial trial procedures • case studies on principles of precedent • case studies on reading and interpreting legislation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Main institutions may include:	• commonwealth, state and territory constitutions • courts • federal system of government • governments • parliaments.
Sources may include:	• British law • colonial laws • common law • customary law • equity statutes • native title.
Legislative powers may include:	• concurrent powers • exclusive powers • specific powers.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - legal administration

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBLEG414A Establish and maintain a file in legal services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage the conduct of a file under the instruction of a designated individual. This includes establishing files, developing and obtaining appropriate documents, liaising with clients, and carrying out file closure procedures. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who apply well established, sound theoretical knowledge in the provision of administrative support in legal services. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Initiate preliminary file activities	1.1. Arrange meeting with ***designated individual*** to discuss new file, and to plan and prioritise preliminary work 1.2. Obtain details of the ***legal matter*** from ***client*** according to ***organisation's policies and procedures*** 1.3. Develop a quote in line with organisation's ***fee structure*** and forward it to instructing legal practitioner for approval 1.4. Forward quote and instructions for establishing a trust account to client on behalf of instructing legal practitioner 1.5. Clarify ***terms of engagement*** with instructing legal practitioner and client and ensure mutual ***expectations*** are agreed upon and documented 1.6. Prepare ***initial file documentation***
2. Carry out conflict of interest check	2.1. Organise self or other person to carry out ***conflict of interest check***

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ELEMENT	PERFORMANCE CRITERIA
	2.2. Record results of conflict of interest check in preliminary file notes, and discuss and resolve areas of potential conflict
3. Open file	3.1. Locate, access and extract relevant information for initiating files 3.2. Select and brief support staff to assist on file, in consultation with designated individual 3.3. Forward confirmation of instructions, details of those working on the file, a summary of work to be performed and associated timelines to client on behalf of instructing legal practitioner 3.4. Plan work in conjunction with designated individual and allocate ***resources***
4. Contact other persons about the file	4.1. Undertake liaison with ***other persons*** and obtain statements if necessary 4.2. Undertake liaison with ***experts*** where appropriate 4.3. Update file notes detailing ***activities***, ***actions and outcomes*** and record time
5. Undertake legal process according to plan	5.1. Carry out legal process as planned with designated individual 5.2. Maintain information flow to designated individual on progress of matter 5.3. Immediately refer ***issues or problems*** outside own range of responsibility to designated individual for resolution 5.4. Monitor trust account to ensure sufficient monies are present and contact instructing legal practitioner to facilitate the transfer of additional funds if necessary 5.5. Keep client up-to-date on matter through progress reports and, where necessary, meetings with designated individual
6. Facilitate file administration and closure	6.1. Organise self or other person to reconcile time records with costing 6.2. Organise self or other person to undertake final costing 6.3. Organise self or other person to prepare invoice 6.4. Arrange meeting with designated individual to review final invoice and ***relevant documentation*** in order to facilitate sign-off before ***forwarding to client*** 6.5. Update and complete file notes

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ELEMENT	PERFORMANCE CRITERIA
	6.6. Ensure final accounting of trust account and resolve outstanding ***disbursements***
	6.7. Close and archive file according to organisation's policies and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - follow and provide clear written and oral sequenced instructions
  - participate in sustained and complex transactions
  - apply questioning techniques to elicit and clarify information
- literacy skills to:
  - follow intricate legal procedures
  - read and interpret legal documents
  - use legal vocabulary and grammatical structures to achieve precise meaning
- numeracy skills to:
  - prepare a quote in line with organisation's fee structure
  - maintain and reconcile time records to inform final costing
  - prepare final invoice for sign-off by client
- research and report writing skills to assemble and evaluate background information and critical documents
- technology skills to:
  - prepare and review invoicing for services
  - research information and prepare reports on outcomes

Required knowledge

- scope of role and responsibilities, and obligation to refer matters to supervisor
- organisation's policies and procedures, including quotation and invoicing procedures
- accepted codes of conduct, including those relating to:
  - privacy and confidentiality
  - use of company property
  - duty of care

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REQUIRED SKILLS AND KNOWLEDGE
• ethical behaviour • non-discriminatory practice • conflict of interest • compliance with reasonable direction • legal terminology, including that specific to area of law • archiving procedures and appropriate file retention periods • relevant court processes, current legislation, legal processes and required documentation

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • document and file information according toorganisation's policies, procedures and legal requirements, and within agreed timeframes • apply organisation's financial systems and procedures according to legal requirements and within agreed timeframes • provide appropriate information, advice and assistance to clients within own scope of responsibility • explain legal and legislative requirements underlying actions • apply knowledge of relevant court processes, current legislation, legal processes and required documentation.
Context of and specific resources for assessment	Assessment must ensure access to: • an actual workplace or simulated environment • workplace manuals and reference materials, such as company policies, procedural manuals, checklists, documentation and sample forms • background information on courts, their jurisdiction and behavioural requirements • appropriate technology, such as computers with relevant software • appropriate texts and people with expert knowledge, such as

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EVIDENCE GUIDE	
	legal practitioners • appropriate legislation and regulations relevant to common legal matters.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this units: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review ofquotes developed and forwarded to instructing legal practitioner for approval • review of preparation ofinitial file documentation • evaluation of documentation with results of conflict of interest checks recorded • review of information forwarded to client on opening a file • evaluation of updated file notes • review of progress reports forwarded to client • analysis of monitoring of trust account • oral or written questioning to assess knowledge of archiving procedures and appropriate file retention periods.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Designated individual may include:	• legal practice manager • legal practitioner • supervisor.
Legal matter may	• agreement • contract

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RANGE STATEMENT	
include:	• disputing a claim • initiating litigation • mediated dispute • protecting rights • settling a dispute • trademark.
Client may include:	• business • government entity • individual • insurance company • legal aid • not-for-profit organisation • third party.
Organisation's policies and procedures may relate to:	• accessing files • conflict of interest check • contingency management • fee structure • individual procedures adopted by instructing legal practitioner • information sources • information specific to the organisation • initiating and updating files • interviewing clients • office procedural manual • protocol for accommodating specific client needs, e.g. case manager, social worker or parole officer • protocol for contacting clients, e.g. translator or interpreter • providing quotes • recording information • security, confidentiality and privacy procedures • telephone protocol • terms of engagement • time-recording procedures • verifying and authorising information.
Fee structure may include:	• fee by hour • fixed quote • scale of costs • special rates • tender.

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RANGE STATEMENT	
Terms of engagement may include:	• fee contingent on success of case • *pro bono* work • referral arrangement • union agreement.
Client ***expectations*** may include:	• bill narrative • billing frequency • charge out rate • estimate of total legal costs • information about avenues for querying invoice details • name and address of recognised professional association (RPA) that regulates the organisation or practitioner • other requirements as described by relevant state, territory and/or local legislation, rules, regulations and codes of practice • reporting frequency.
Initial file documentation may involve:	• assigning file or matter number to client • ensuring file or matter number is attached to all relevant documentation • recording relevant client matter details.
Conflict of interest check may include:	• accounting package • databases • past working history of supervisor • searching files.
Conflict of interest may include:	• representing other party • representing relative • vested interest in outcome.

Resources may include:	• access to:
	  • experts
	  • office materials
	  • services
	  • staff
	• time
	• venues for liaison and meetings.

Other persons with whom liaison may occur may include:	• experts • government departments and agencies • opposing parties.
Experts may include:	• historian • medical practitioner

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RANGE STATEMENT	
	• parole officer • psychiatrist • psychologist • social scientist • social worker.
Activities, ***actions and outcomes*** may include:	• consulting experts • exchange of information • failure to return call • process of discovery • verbal communication with external parties.
Issues or problems may include:	• difficulties with accessing required information • ensuring that support staff are adhering to security, confidentiality, privacy and timeline requirements • technical difficulties.
Relevant documentation may include:	• agreements • bank statements • briefs • contracts • information for client • internal correspondence • leases • letters • memorandums of law • mortgages • opinion letters • organisation's templates • other financial documentation • pleadings • precedents • statements • transcripts from supervisor's notes • transfer of shares • wills • other relevant documentation required under commonwealth, state or territory and local legislation, rules, regulations and codes of practice.
Relevant documentation to be ***forwarded to client*** may include:	• certificates • experts' reports • letters.

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RANGE STATEMENT	
Disbursements may include:	• billable hours • cost of duty stamps • court costs • filing fees • hiring experts • hiring services • photocopying • postage.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - legal administration

Co-requisite units

Co-requisite units		

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BSBLEG415A Apply the principles of contract law

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to enable a person to assess contractual issues in a legal environment. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who apply knowledge of a range of principles in assessing contractual issues. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Determine the nature and meaning of contract	1.1. Access ***sources of legal information*** on the nature and meaning of contract 1.2. Distinguish between common law and legislation in contract 1.3. Assess the significance of contracts and contract law in business, and document the outcomes of this assessment
2. Determine the principles of contract law	2.1. Define legal principles governing simple ***contracts*** 2.2. Identify and document key elements of a simple contract matter
3. Enhance professional practice through application of relevant principles of contract law	3.1. Assess a legal matter involving contractual issues by applying principles of contract law 3.2. Analyse and evaluate the key issues 3.3. Review analysis with ***designated person***
4. Distinguish between a contract being discharged or breached	4.1. Specify procedures for the discharge of contracts 4.2. List available remedies for breach of contract 4.3. Apply procedures for discharge of contracts to workplace legal matter 4.4. Apply identified remedies to a relevant workplace legal matter

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• literacy skills to read and interpret written material
• research and data collection skills to identify:
  • characteristics, similarities and differences of Australian institutions
  • types of proceedings and trial procedures
• analytical skills to investigate and compare legal institutions and assess simple legal matters related to contract

Required knowledge
• commonly used legal terminology, institutions and main features of the Australian legal system • methods used to identify appropriate information about sources of Australian law • nature, aims and rationale of contracts, including agreements, intention to create legal relations, consideration, and capacity to contract • remedies for breach of contract • illegal and void contracts • privacy of contract and assignment of contract

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • demonstrate knowledge of the principles of contract law • apply the principles of contract law • demonstrate knowledge of the steps for the discharge of a contract • demonstrate knowledge of remedies for breach of contract.
Context of and specific resources for assessment	Assessment must ensure access to:

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EVIDENCE GUIDE	
	• legislation and regulations relevant to contract law • texts and background sources of information on contract law in Australia • case studies involving a range of legal matters relevant to contract law • personnel with expert knowledge of contract law.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios in a range of contractual contexts • tests of knowledge of relevant legislation, rules, regulations and research sources • direct questioning combined with portfolios of evidence • review of authenticated documents from the workplace.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Sources of legal information may include:	• court library • online information services and websites • organisation's library • precedent bank • specialist texts.
Contracts may include:	• commercial and business contracts • contract for services rendered • employment contracts • sale of property.
Designated persons may	• barrister

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RANGE STATEMENT	
include:	• legal practice manager • legal practitioner • supervisor.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - legal administration

Co-requisite units

Co-requisite units		

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BSBLEG416A Apply the principles of the law of torts

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to enable a person to apply the principles of the law of torts in a legal environment. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who apply knowledge of a range of principles of the law of torts. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Define nature and meaning of law of torts	1.1. Access ***sources of legal information*** on the nature and meaning of law of torts 1.2. Distinguish tort from crime, breach of contract, or other legal obligations
2. Identify principles of the law of torts	2.1. Define legal principles in the ***application of the law of torts*** 2.2. Determine key elements of law of torts matters
3. Apply relevant elements of tort	3.1. Assess legal matters relevant to possible torts 3.2. Analyse and evaluate information 3.3. Extract and document information relevant to particular matter
4. Identify remedies for breaches of law of torts	4.1. Identify circumstances giving rise to liability in law of torts 4.2. Identify and document remedies applicable to breach 4.3. Submit findings to ***designated person*** according to organisational policies and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• literacy skills to read and interpret written material
• research and data collection skills to identify:
  • characteristics, similarities and differences of Australian institutions
  • types of proceedings and trial procedures
• analytical skills to investigate and compare legal institutions

Required knowledge

• commonly used legal terminology, institutions and main features of the Australian legal system
• methods used to identify appropriate information about sources of Australian law
• nature and meaning of law of torts
• torts relating to:
  • negligence
  • negligent misrepresentation
  • person, goods and land
• meaning of:
  • occupier's liability
  • vicarious liability
• law of defamation

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • demonstrate knowledge of the principles of the law of torts • demonstrate knowledge of the application of the law of torts • demonstrate knowledge of liability of burden in the law of torts • apply the principles of the law of torts.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure access to: • legislation and regulations relevant to the law of torts • texts and background sources of information on the law of torts in Australia • case studies involving a range of legal matters relevant to the law of torts • personnel with expert knowledge of the law of torts.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios in a range of contexts involving the law of torts • tests of knowledge of relevant legislation, rules, regulations and research sources • direct questioning combined with portfolios of evidence • review of authenticated documents from the workplace.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Sources of legal information may include:	• court library • online information services and websites • organisation's library • precedent bank • specialist texts.
Application of the law of torts may include:	• defamation • negligence • protection of interests in goods • protection of interests in land

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RANGE STATEMENT	
	• trespass to the person.
Designated persons may include:	• barrister • legal practice manager • legal practitioner • supervisor.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - legal administration

Co-requisite units

Co-requisite units		

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BSBLEG417A Apply the principles of evidence law

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assess issues associated with evidence law in a legal environment. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who apply knowledge of a range of principles in evidence law. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Define nature and meaning of evidence law	1.1. Access ***sources of legal information*** on nature and meaning of evidence law 1.2. Distinguish between case law and legislation related to evidence 1.3. Assess the significance of evidence law in ***various contexts*** in a legal environment
2. Identify principles of evidence law	2.1. Define and document legal principles governing evidence 2.2. Determine key concepts underpinning evidence law
3. Enhance professional practice through application of relevant principles of evidence law	3.1. Apply the principles of evidence to relevant legal matters arising in the workplace 3.2. Analyse and evaluate key issues 3.3. Review analysis with ***designated person***
4. Identify relevant and admissible evidence	4.1. Distinguish relevant and admissible evidence in the context of a legal matter 4.2. Identify consequence of evidence not being relevant and/or admissible

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• literacy skills to read and interpret written material
• research and data collection skills to identify:
  • characteristics, similarities and differences of Australian institutions
  • types of proceedings and trial procedures
• analytical skills to investigate and compare legal institutions and legal matters

Required knowledge

• commonly used legal terminology, institutions and main features of the Australian legal system
• methods used to identify appropriate information about sources of Australian law
• nature and meaning of evidence law, including:
  • standard and burden of proof
  • relevance of evidence
  • hearsay evidence
  • competence and compellability of witnesses
  • opinion evidence
  • evidence of character

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • demonstrate knowledge of the principles of evidence law • apply the principles of evidence law • demonstrate knowledge of the application of admissible law in a range of contexts.
Context of and specific	Assessment must ensure access to:

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EVIDENCE GUIDE	
resources for assessment	• legislation, regulations and case law relevant to evidence law • texts and background sources of information on evidence law in Australia • case studies involving a range of evidence law matters • personnel with knowledge of evidence law.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios in a range of contexts involving evidence law • tests of knowledge of relevant legislation, rules, regulations and research sources • direct questioning combined with portfolios of evidence • review of authenticated documents from the workplace.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Sources of legal information may include:	• court library • online information services and websites • organisation's library • precedent bank • specialist texts.
Various contexts may include:	• civil disputes • criminal liability • examination of witnesses • insurance disputes • preparation for civil trial • preparation for criminal trial.

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RANGE STATEMENT	
Designated persons may include:	• barrister • legal practice manager • legal practitioner • supervisor.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - legal administration

Co-requisite units

Co-requisite units		

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BSBLEG418A Produce complex legal documents

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to produce complex legal documents using a range of advanced functions within at least one software package and integrating functions from at least two software packages. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who apply a broad knowledge of administration tasks in providing support in a legal context. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish document design and structure	1.1. Identify requirements of task in line with instructions 1.2. Select ***software*** appropriate to task 1.3. Determine ***document*** design and structure 1.4. ***Design and structure document*** to meet legislative requirements 1.5. Review and update ***existing precedent documents***
2. Develop precedents for document design	2.1. Develop and use precedents to ensure consistency of design and layout 2.2. Evaluate and amend templates to ensure document requirements can be met 2.3. Recommend improvements to design and/or structure of existing documents and facilitate a review process of suggested improvements
3. Prepare to produce documents	3.1. Prepare documents using appropriate and available precedent documents according to ***organisation's policies and procedures*** 3.2. Enter and edit relevant data 3.3. Use a range of advanced software functions to ensure accurate completion of task

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Check documents for spelling, grammar, numeric data and layout 3.5. Proofread documents for accuracy of content and consistency of layout and style 3.6. Make modifications to meet required specifications 3.7. Manage any ***difficulties*** to produce completed documents within agreed timelines
4. Prepare to print documents	4.1. Print documents as required 4.2. Arrange review of documents with ***designated person*** 4.3. Undertake final printing of documents
5. Save file and exit system	5.1. Save and store document in appropriate directory or folder 5.2. Close file and exit application programs without loss of data 5.3. Make back-up copies of file according to specified procedures 5.4. File and store discs/data according to organisation's policies and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - follow and interpret instructions
  - provide clear and specific instructions about information required
- literacy skills to:
  - follow complex legal procedures
  - consider aspects of context, purpose and audience when generating and formatting texts
  - edit and proofread to ensure:
    - clarity of meaning and conformity to enterprise requirements
    - accuracy and consistency of information
- numeracy skills to collate and present data, graphs and annotated references

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REQUIRED SKILLS AND KNOWLEDGE
• problem-solving skills to use processes flexibly and interchangeably • technology skills to use a range of software applications • organisational skills to select and apply the procedures and strategies needed to perform a range of tasks within designated timelines
Required knowledge

• application of organisation's policies and procedures in relation to precedent design
• developing and testing templates
• accepted codes of practice relevant to the workplace, including those relating to:
  • privacy and confidentiality
  • use of company property
  • duty of care
  • ethical behaviour
  • non-discriminatory practice
  • conflict of interest
  • compliance with reasonable direction

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • ensure that confidentiality and security of information are maintained • produce and present accurate documents that conform to specified standards within agreed timelines • use advanced functions of at least one software package or integrate functions of at least two software packages, in document production • apply knowledge of relevant legislation, rules, regulations, codes of practice and research resources.
Context of and specific resources for assessment	Assessment must ensure access to: • the internet

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EVIDENCE GUIDE	
	• an actual workplace or simulated environment • workplace manuals and reference materials, such as company policies, procedural manuals, checklists, sources of documentation and sample forms • background information on courts, their jurisdiction and behavioural requirements • appropriate technology, such as computers with relevant software • appropriate texts and people with expert knowledge, such as legal practitioners • appropriate legislation and regulations relevant to legal context.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of precedents and documents created from precedents • class assessment to produce and/or amend precedents in a given timeframe • third-party workplace reports of on-the-job performance by the candidate where appropriate • oral or written questioning to assess knowledge of accepted codes of practice relevant to the workplace • completed precedent/documents within given timeframes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Software packages may include:	• database • document management software • graphics

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RANGE STATEMENT	
	• page layout software • spreadsheet • word processing.
Documents may include:	• contracts • costings • court documents for filing in a variety of courts and tribunals • deeds and agreements • in-house newsletters • precedents used in organisation • promotional brochures • research reports • wills.
Document design and structure may include:	• advanced software functions • constraints regarding organisation's style and letterhead • instructions for word processing operator • legislated document layout guidelines • links to existing information • precedents' manuals • range of complex software supporting the production of precedents.
Existing precedent documents may include:	• business structure documents • conveyancing documents • documents used in civil proceedings • documents used in criminal proceedings • family law documents • generic correspondence • wills and probate documents.
Organisation's policies and procedures may include:	• accessing files • authorising creation of new legal precedents • authorising precedent changes • back-up procedures • file maintenance • information sources • information specific to the organisation • initiation of files • office procedural manuals • use of precedent and file naming conventions of document • security, confidentiality and privacy procedures

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RANGE STATEMENT	
	• verifying and authorising information.
Difficulties needing management may include:	• alterations to instructions • client needs • lack of available or suitable resources • problems encountered when liaising with others • technical difficulties.
Designated person may include:	• barrister • lawyer • legal practice manager • paralegal • partner • supervisor.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - legal administration

Co-requisite units

Co-requisite units		

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BSBLEG510A Apply legal principles in family law matters

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to apply legal principles in family law matters. It is relevant to marriage dissolution; property settlement; maintenance, contact and residence; counselling and mediation; and the appeals process. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who apply knowledge of a range of principles in family law matters. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify laws related to family law	1.1. Source ***legislation***, ***regulations and policies*** relevant to family law 1.2. Interpret key legal principles as they apply to family law matters
2. Apply principles of family laws in relation to marriage dissolution, property settlement and dealing with minors	2.1. Identify and apply ***steps involved in marriage dissolution*** 2.2. Establish facts about proposed dissolution and ***client*** interests 2.3. Determine if agreement has been reached before filing on all issues regarding property, support and parenting
3. Identify and prepare appropriate costing documentation	3.1. Identify ***legislative and regulatory requirements*** for costing legal services 3.2. Determine types of costs that apply 3.3. Prepare relevant costing documentation according to ***organisation's policies and procedures***
4. Prepare and despatch documentation	4.1. Organise self and others with respect to file documentation and administration in accordance with ***organisation's policies and procedures*** 4.2. Obtain and forward ***relevant background***

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ELEMENT	PERFORMANCE CRITERIA
	documentation to ***designated person*** for review 4.3. Prepare and present ***relevant documents*** to designated individual for review and sign-off

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - give and interpret instructions
  - obtain personal information from clients
  - explain legal procedures to clients
- literacy skills to:
  - follow complex legal procedures related to family law
  - complete relevant family law documentation
  - edit and proofread documentation for accuracy and consistency of information
- research skills to:
  - locate necessary information from external sources
  - identify and evaluate status of information
- interpersonal skills to participate in meetings between opposing parties in a legal matter
- organisational skills to:
  - make arrangements for meetings
  - receive and despatch documents
- numeracy skills to calculate maintenance obligations
- technology skills to operate office equipment and common software packages

Required knowledge

- scope of job role in the workplace
- relevant court processes, current legislation, legal processes and required documentation as they relate to family law
- organisation's required policies and procedures for the full range of tasks covered
- legal terminology, including that specific to family law
- family law as applicable to the scope of workplace responsibilities
- accepted codes of practice relevant to the workplace, including those relating to:

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REQUIRED SKILLS AND KNOWLEDGE
• privacy and confidentiality • use of company property • duty of care • ethical behaviour • non-discriminatory practice • conflict of interest • compliance with reasonable direction

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • apply knowledge of the legal and philosophical basis of family law in providing appropriate information and documentation to clients at appropriate stages of the legal process • apply relevant non-litigious solutions where appropriate • adhere to accepted codes of conduct, including those relating to maintaining confidentiality, use of company property, duty of care, ethical behaviour, privacy, non-discriminatory practice, conflict of interest, and compliance with reasonable direction.
Context of and specific resources for assessment	Assessment must ensure access to: • an actual workplace or simulated environment • appropriate legislation and regulations relevant to family law • workplace manuals and reference materials, such as company policies, procedural manuals, checklists, sources of documentation and sample forms • background information on courts, their jurisdiction and behavioural requirements • appropriate technology, such as computers with relevant software • appropriate texts and people with expert knowledge, such as legal practitioners • appropriate legislation and regulations relevant to common legal

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EVIDENCE GUIDE	
	matters.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this units: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of role plays • review of marriage dissolution and other relevant documents prepared • evaluation of level of maintenance calculated • oral or written questioning to assess knowledge of legal terminology specific to family law.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Legislation, ***regulations and policies*** may include:	• commonwealth, state and territory legislation and regulations relating to:
	  • family law, including marriage dissolution, property settlement, family violence and custody of children
	  • taxation.

Steps involved in marriage dissolution may include:	• period of twelve month separation • court ordered mediation • addressing issues arising from family violence • acknowledging service • applying to Family Court for dissolution of marriage • assessing spouse's respective assets and personal input into marriage

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RANGE STATEMENT	
	• court counselling and mediation • court hearings • granting of decree nisi • determining maintenance arrangements • one month after granting of decree nisi, granting of decree absolute • determining residence and contact • serving dissolution documents • serving subpoena to give evidence at court • settling on property • three month cohabitation where possible • where children are involved, settling on custody arrangements • possible appeal rights.
Client may include:	• applicant for marriage dissolution (person seeking a divorce) • grandparent or guardian • husband • wife.
Legislative and regulatory requirements may relate to:	• client and organisation, such as consumer protection policies • establishing a trust account • government legal practice Acts in state or territory • legislation and regulations governing family law and associated matters.

Organisation's policies and procedures relating to costing documentation may relate to:	• credit policy
	• protocol for costing, including:
	  • billable hours
	  • fixed quote
	  • legal aid requirements
	  • no fee no win
	  • *pro bono*
	  • scale of costs
	  • special rates
	  • tender rates
	• recording information
	• security, confidentiality and privacy procedures
	• using external cost consultants
	• verifying and authorising information.

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RANGE STATEMENT	
Organisation's policies and procedures relating to file documentation and administration may include:	• accessing files • code of conduct • conflict of interest check • contingency management • fee structure • individual procedures adopted by instructing legal practitioner • information sources • initiation of files • interviewing • office procedural manual • protocol for accommodating specific client needs, e.g. case manager or social worker • protocol for contacting clients, e.g. translator or interpreter • recording information • telephone protocol • time-recording procedures.
Relevant background documentation may include:	• affidavits concerning personal input into marriage • application for final orders • bank statements • certificates • documentation concerning school fees and expenses • expert reports • land title documents • letters • mortgage documents • other financial statements • salary documents • statement of shares • taxation documents.
Designated person may include:	• barrister • legal practice manager • legal practitioner • supervisor.
Relevant documents may include:	• acknowledgement of service • affidavits on various matters • application for dissolution of marriage • counselling certificate • letter confirming the granting of a decree nisi

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RANGE STATEMENT	
	• letters to clients • marriage certificate.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - legal administration

Co-requisite units

Co-requisite units		

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BSBLEG511A Apply legal principles in criminal law matters

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to apply legal principles and carry out administrative tasks associated with criminal law matters. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who apply knowledge of a range of principles in criminal law matters. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify laws related to criminal law	1.1. Source ***legislation***, ***regulations and policies*** relevant to criminal law 1.2. Interpret key legal principles as they apply to criminal law matters
2. Enhance professional practice through application of relevant principles of criminal law	2.1. Identify ***different criminal matters***, ***defences***, ***types of hearings***, criminal ***jurisdictions*** and types of ***courts*** and explain relationships between them 2.2. Receive call from ***client*** or police and communicate details of client charge and bail status to legal practitioner
3. Draft and process documents involved in criminal law matters	3.1. Prepare letters and other ***documents*** for legal practitioner for review and sign-off according to ***organisation's policies and procedures*** 3.2. Determine types of costs in accordance with legislative and regulatory requirements for costing legal services 3.3. Ensure documents are ***despatched*** according to instructions 3.4. Facilitate liaison and communication between the parties 3.5. Maintain files, noting critical dates and reminders

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - give and interpret instructions
  - clarify discussions
  - provide required information
- literacy skills to:
  - follow complex legal procedures
  - complete documentation
  - summarise cases
  - edit and proofread documentation for accuracy and consistency of information
- research skills to:
  - locate necessary information from external sources
  - identify and evaluate status of information
- organisational skills to make arrangements and appointments
- technology skills to:
  - operate office equipment
  - use a range of common software packages

Required knowledge

- scope of job role in the context of legislation, regulations and codes of practice in relevant jurisdictions
- relevant court processes, current legislation, legal processes and required documentation
- organisation'srequired policies and procedures for the full range of tasks covered
- legal terminology, including that specific to criminal law
- criminal law as applicable to the scope of workplace responsibilities
- accepted codes of practice relevant to the workplace, including those relating to:
  - privacy and confidentiality
  - use of company property
  - duty of care
  - ethical behaviour
  - non-discriminatory practice
  - conflict of interest
  - compliance with reasonable direction
- legislative requirements, which may relate to:

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REQUIRED SKILLS AND KNOWLEDGE
• client and firm (e.g. Consumer Credit Code, Privacy Act and secrecy laws) • criminal law • relevant commonwealth, state or territory legislation • schedules of fees and duties payable • tort, equity and statute law • trust accounts

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • prepare appropriate documentation and information according to organisation's policies and procedures and provide to clients at the appropriate time • treat clients in a sensitive, discreet and professional manner • conduct work within accepted codes of conduct, including those relating to maintaining confidentiality, use of company property, duty of care, ethical behaviours, privacy, non-discriminatory practice, conflict of interests and compliance with reasonable direction • demonstrate knowledge of criminal law as applicable to the scope of workplace responsibilities.
Context of and specific resources for assessment	Assessment must ensure access to: • an actual workplace or simulated environment • workplace manuals and reference materials, such as company policies, procedural manuals, checklists, documentation and sample forms • background information on courts, their jurisdiction and behavioural requirements • appropriate technology, such as computers with relevant software • appropriate texts and people with expert knowledge, such as legal practitioners

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EVIDENCE GUIDE	
	• appropriate legislation and regulations relevant to common legal matters.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge.The following examples are appropriate for this units: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of role plays • review of summaries made of common law cases • review of possible barristers' details forwarded to instructing legal practitioners • review of briefs prepared for barrister in conjunction with instructing legal practitioner • oral or written questioning to assess knowledge of legal terminology specific to criminal law.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legislation, ***regulations and policies*** may include:	• criminal law • government regulations and policies relating to criminal law matters • relevant commonwealth, state or territory legislation.
Different criminal matters may relate to:	• assault • excusable homicide • homicide • manslaughter • murder

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RANGE STATEMENT	
	• property offences, including theft and larceny • unlawful sexual intercourse.
Defences may relate to:	• automatism • denial • duress • ignorance of the law • infancy • insanity • intoxication • irresistible impulse or provocation • mistake of fact • necessity • self-defence.
Types of hearings may include:	• committal • indictable, for example felonies/crimes and misdemeanours • summary.
Jurisdiction over criminal matters may include variances between:	• Australian government • local law • states and territories.
State ***courts*** in which criminal cases are heard:	• county/district • magistrates • supreme.
Client may include:	• defendant • prosecutor • victim.
Documents may include:	• account • adjournment letters • affidavits • artefacts • briefs • clinical reports • confirming/reporting letter to client outlining results of court hearing • court forms • court reminder letters • expert reports • hospital discharge summaries

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RANGE STATEMENT	
	• letters • medical reports • photographs • pleading documents • records of prior convictions • subpoena • summary of matter • videos • witness statements • writs.
Organisation's policies and procedures may include:	• engaging barristers • engaging experts • individual procedures adopted by instructing legal practitioner • protocol for accommodating specific client needs, e.g. case manager, social worker or parole officer • protocol for contacting clients, e.g. translator or interpreter • recording information • security, confidentiality and privacy procedures • verifying and authorising information.
Documents may be ***despatched*** to the following:	• Attorney General's office • client • court • Crown • Crown Solicitor's office • Department of Public Prosecutions • government organisation • opposing party • opposing party's legal representative • police • service agency • sheriff.

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Administration - legal administration

Co-requisite units

Co-requisite units		

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BSBLEG512A Apply legal principles in property law matters

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required in the conduct and administration of straightforward property law matters. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who apply knowledge of a range of principles in property law matters. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Define nature of property law	1.1. Source ***legislation***, ***regulations and policies*** relevant to property law 1.2. Outline difference between real and personal property and make distinctions about their method of transfer 1.3. Identify ***titles of ownership*** and their legal implications 1.4. Identify types of mortgages, their legal implications, processes for obtaining and discharging them, and the rights of mortgagees
2. Enhance professional practice through application of relevant principles of property law matters	2.1. Identify ***parties involved in buying and selling a property*** and their respective roles 2.2. Identify ***steps involved in buying and selling a property***
3. Prepare documentation associated with property law matters, including costing	3.1. Obtain ***relevant documents*** from ***authorities and service providers*** 3.2. Ensure ***documentation*** associated with sale or purchase of property is prepared according to ***organisation's policies and procedures*** 3.3. ***Determine types of costs in accordance with legislative and regulatory requirements for costing legal services***

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Draft leases according to instructions 3.5. Identify the duties of lessor and lessee 3.6. Ensure documentation is reviewed and signed off by ***designated person***
4. Facilitate file administration	4.1. Arrange meetings and conferences as appropriate 4.2. Register and lodge relevant documents with land titles and other relevant government agencies 4.3. Check documentation and maintain file according to organisation's policies and procedures 4.4. Attend to post-settlement procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - give and interpret instructions
  - provide clear and specific instructions about information required
- literacy skills to:
  - follow complex legal procedures
  - edit and proofread documents to ensure clarity of meaning and conformity to enterprise requirements
  - check for accuracy and consistency of information
- numeracy skills to:
  - record deposits
  - calculate stamp duties, outstanding mortgage payments and bank cheque amounts
- organisational skills toselect and apply the procedures and strategies needed to perform a range of tasks within designated timelines
- research skills to:
  - locate necessary information from external sources
  - identify and evaluate the status of information
- technology skills to:
  - operate office equipment
  - use a range of common software packages

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REQUIRED SKILLS AND KNOWLEDGE
• time-management skills to prepare documentation within timelines
Required knowledge

• scope of job role in the context of legislation, regulations and codes of practice in relevant jurisdictions
• relevant court processes, current legislation, legal processes and required documentation
• property law as applicable to the scope of workplace responsibilities
• accepted codes of practice relevant to the workplace, including those relating to:
  • privacy and confidentiality
  • use of company property
  • duty of care
  • ethical behaviour
  • non-discriminatory practice
  • conflict of interest
  • compliance with reasonable direction
• organisation's required policies and procedures for the full range of tasks covered
• legal terminology, including that specific to property law

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • prepare, give and obtain appropriate and accurate information and documents from the parties at the required stages of the legal process • conduct duties according to accepted codes of conduct, including those relating to maintaining confidentiality, use of company property, duty of care, ethical behaviours, privacy, non-discriminatory practice, conflict of interest and compliance with reasonable direction • apply the principles of property law in the buying and selling of property and preparation and execution of leases

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EVIDENCE GUIDE	
	• carry out the administrative activities associated with buying and selling property and preparing leasing contracts.
Context of and specific resources for assessment	Assessment must ensure access to: • an actual workplace or simulated environment • appropriate legislation and regulations relevant to property law • workplace manuals and reference materials, such as company policies, procedural manuals and checklists • list of relevant sources of documentation and sample forms • background information on courts, their jurisdiction and behavioural requirements • appropriate technology, such as computers with relevant software • appropriate texts and people with expert knowledge, such as legal practitioners • appropriate legislation and regulations relevant to common legal matters.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge.The following examples are appropriate for this units: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of role plays • review of draft residential and commercial leasing contract • review of draft contract of sale • review of pre-settlement and post-settlement documents • oral or written questioning to assess knowledge of legal terminology specific to property law.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating

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RANGE STATEMENT	
conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legislation, ***regulations and policies*** may include:	• commonwealth, state and territory legislation relevant to property law • government regulations and policies on property law.
Titles of ownership must include:	• 99 year lease • community • company • old system • qualified • strata title • torrens.
Parties involved in buying and selling a property may include:	• agent • first mortgagee's representative • purchaser • purchaser's representative • second mortgagee's representative • vendor • vendor's representative.
Steps involved in buying and selling a property may include:	• arranging deposit • arranging settlement meeting • calculating balance and to whom payment should be made • despatching documents to relevant parties • discharging vendor's mortgage/s • exchanging contracts • handling requisitions • invoicing client • preparing prescribed documents and contracts • registering documents at land titles office • securing finance • signing contracts • stamping documents • transferring title • updating files and titles book.
Relevant documents include:	• certificate of title • documents concerning easements and right of way • plan of land • plan of sewerage on property

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RANGE STATEMENT	
	• town planning certificate.
Authorities and service providers include:	• land titles office • local government offices • water authorities.
Documentation may include:	• contract attachments • contract of sale • forward transfer • letter of confirmation of settlement • order of agent • settlement documents, including settlement sheet.
Organisation's policies and procedures may include:	• contingency management • individual procedures adopted by instructing legal practitioner • office procedural manuals • precedents for various property documents • protocol for accommodating specific client needs • recording information • requisition forms • security, confidentiality and privacy procedures • using electronic document exchange systems • using electronic funds transfer systems.
Designated person may include:	• barrister • government official • legal practitioner • person authorised by government to carry out identified property law matters • supervisor.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - legal administration

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Co-requisite units

Co-requisite units		

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BSBLEG513A Apply legal principles in corporation law matters

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to apply legal principles in corporation law matters, including establishing business structures and preparing associated documentation. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who apply knowledge of a range of principles in corporation law matters. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify laws and principles of corporation law	1.1. Source knowledge of corporation law and related ***legislation*** 1.2. Identify ***different types of business structures*** and clearly outline their structure, personnel, legal obligations, establishment procedures and purpose 1.3. Identify the differences between proprietary companies and public companies, and clearly outline the legal obligations, criteria and purpose of each
2. Enhance professional practice through application of relevant corporation law principles to business structures	2.1. Identify ***consequences of incorporation*** 2.2. Identify structure, contents and purposes of an organisation's memorandum of association and articles of association 2.3. Identify other ***specific activities*** relevant to corporation law
3. Undertake administrative tasks associated with corporation law	3.1. Prepare ***forms***, documents and annexures at the appropriate time, present to ***designated person*** for review and sign-off, and lodge with the appropriate government department 3.2. Make arrangements for documents to be despatched, signed and witnessed by ***appropriate parties*** 3.3. Provide assistance in preparing company prospectus where required 3.4. Arrange meetings as necessary to discuss the nature

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ELEMENT	PERFORMANCE CRITERIA
	of debenture and the assets underwriting the charge 3.5. Undertake appropriate searches and obtain ***search documents*** from ***relevant agencies*** 3.6. Prepare ***forms and documents related to the administration of charges*** at the appropriate time, present to designated person for review and sign-off, and lodge with the appropriate government department 3.7. Determine types of costs for legal services in accordance with legislative and regulatory requirements 3.8. Make arrangements for documents to be despatched, signed and witnessed by ***appropriate parties***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills toprovide clear and specific instructions about information required
- literacy skills to:
  - follow complex legal procedures
  - consider aspects of context, purpose and audience when generating and formatting documents
  - edit and proofread to ensure accuracy, consistency, clarity of meaning and conformity to enterprise requirements
- research skills to:
  - locate necessary information from external sources
  - identify and evaluate status of information
- organisational skills to prepare, complete and despatch documents in a timely fashion
- technology skills to:
  - operate office equipment
  - use a range of common software packages

Required knowledge

- scope of job role in the context of legislation, regulations and codes of practice in

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REQUIRED SKILLS AND KNOWLEDGE

relevant jurisdictions
• relevant court processes, current legislation, legal processes and required documentation
• organisation's required policies and procedures for the full range of tasks covered
• legal terminology, including that specific to corporation law
• accepted codes of practice relevant to the workplace, including those relating to:
  • privacy and confidentiality
  • use of company property
  • duty of care
  • ethical behaviour
  • non-discriminatory practice
  • conflict of interest
  • compliance with reasonable direction

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • prepare and lodge appropriate and accurate information and documents at the required stages of the legal process • conduct all duties within accepted codes of conduct, including those relating to maintaining confidentiality, use of company property, duty of care, ethical behaviours, privacy, non-discriminatory practice, conflict of interest and compliance with reasonable direction • apply knowledge of relevant court processes, current legislation, legal processes and required documentation.
Context of and specific resources for assessment	Assessment must ensure access to: • an actual workplace or simulated environment • appropriate legislation and regulations relevant to corporation law matters • workplace manuals and reference materials, such as company

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EVIDENCE GUIDE	
	policies, procedural manuals, checklists and sample forms • background information on courts, their jurisdiction and behavioural requirements • appropriate technology, such as computers with relevant software • appropriate texts and people with expert knowledge, such as legal practitioners • appropriate legislation and regulations relevant to common legal matters.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of role plays • review of documentation outlining the legal obligations, criteria and purpose of proprietary companies, public companies and franchises • review of forms, documents and annexures prepared for appropriate parties for review and sign-off • oral or written questioning to assess knowledge of legal terminology and practice specific to corporation law.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legislation includes that relating to:	• area of law • Australian Taxation Office regulations

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RANGE STATEMENT	
	• client and firm • relevant federal corporation law • relevant state and territory corporation law • schedules of fees and duties payable • taxation and banking requirements • tort, equity and statute law • trust accounts.
Different types of business structures and business arrangements include:	• association • company limited by guarantee • company limited by shares • company limited by shares and guarantee • franchise • holding company • no-liability company • partnerships, including joint ventures, formal and informal • registrable Australian corporation • shelf company • subsidiary company • trusts, including express, discretionary and bare • unlimited company.
Consequences of incorporation relate to:	• formalities, publicity and expense • limited liability • perpetual succession • property • separate legal entity • suing and being sued • transfer of shares.
Specified activities within corporation law relate to:	• annual general meeting • auditing • cessation of business • class meeting • extraordinary general meeting • liquidation • statutory meeting • take-overs • winding up.
Forms involved in incorporation may	• application for: • registration as a company

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RANGE STATEMENT	
include:	• registration of a business name • reservation of a name • notice of resolution • notification of: • allotment of shares • consenting directors • initial appointment of office holders • statement of change in certain particulars, such as persons in relation to whom the business name is registered.
Designated person may include:	• legal practitioner • practice manager • supervisor.
Appropriate parties involved in the incorporation of a company include:	• company secretary • director • manager • shareholder • subscriber • witness.
Search documents may include:	• certificate of incorporation • certificate of title.
Relevant agencies include:	• Australian Securities and Investments Commission to confirm company details and prior charges • land titles office to check if borrower's property is subject to any outstanding dealings, charges and/or mortgages.
Forms and documents related to the administration of charges include:	• charge document, which an organisation may have in its precedent bank • equitable charge document • mortgage document • notification of details of change • notification of discharge or release of property from a charge • prior charge documents • priority agreement with previous mortgagees or chargees • prospectus • stamp duty compliance form.
Appropriate parties	• borrower's solicitor

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RANGE STATEMENT	
involved in arranging charges include:	• company secretary • director • lender • lender's solicitor • manager • previous mortgagee or chargee • previous mortgagee or chargee's solicitor • shareholder • subscriber • witness.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - legal administration

Co-requisite units

Co-requisite units		

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BSBLEG514A Assist with civil procedure

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assist in civil procedure and litigation. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who provide administrative support in civil procedure contexts. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify laws and structures related to civil procedure	1.1. Identify jurisdictional limits of federal, state and territory courts and tribunals in relation to dispute resolution 1.2. Source ***legislation***, ***regulations and policies*** relevant to civil procedure 1.3. Identify the roles of ***court personnel***
2. Assess matter in dispute	2.1. Liaise with designated individual about the matter in dispute 2.2. Prepare relevant costing documents 2.3. Identify and consider ***options to litigation***
3. Prepare and assist in litigation proceedings	3.1. Determine the ***steps prior to litigation*** 3.2. Obtain and prepare ***relevant documentation*** for ***designated person*** according to ***organisation's policies and procedures***
4. Assist with interlocutory process	4.1. Identify the ***purpose of discovery*** and associated ***legal obligations*** 4.2. Undertake ***administrative tasks*** associated with discovery process

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - give and interpret instructions
  - obtain personal information from clients
  - explain legal procedures to clients
- literacy skills to:
  - follow complex legal procedures related to civil law
  - complete relevant documentation
  - edit and proofread documentation for accuracy and consistency of information
- research skills to:
  - locate necessary information from external sources
  - identify and evaluate status of information
- interpersonal skills to participate in meetings between opposing parties in a legal matter
- organisational skills to:
  - make arrangements for meetings
  - receive and despatch documents
- technology skills to operate office equipment and common software packages

Required knowledge

- limitations of job role as determined by relevant jurisdictions
- relevant court processes, current legislation, legal processes and required documentation as they relate to civil procedure
- organisation's required policies and procedures for the full range of tasks covered
- legal terminology, including that specific to civil procedure
- civil procedure as applicable to the scope of workplace responsibilities
- accepted codes of practice relevant to the workplace, including those relating to:
  - privacy and confidentiality
  - use of company property
  - duty of care
  - ethical behaviour
  - non-discriminatory practice
  - conflict of interest
  - compliance with reasonable direction

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • apply knowledge of civil procedure to relevant legal matters • apply knowledge of alternative dispute resolution, purpose of discovery, discovery process and associated legal obligations in a manner that conforms to workplace expectations • prepare accurate, compliant and complete document lists according to standard legislative procedures and organisation's policies and procedures.
Context of and specific resources for assessment	Assessment must ensure access to: • an actual workplace or simulated environment • appropriate legislation and regulations relevant to civil procedure • workplace manuals and reference materials, such as company policies, procedural manuals, checklists, sources of documentation and sample forms • background information on courts, their jurisdiction and behavioural requirements • appropriate technology, such as computers with relevant software • appropriate texts and people with expert knowledge, such as legal practitioners • appropriate legislation and regulations relevant to common legal matters.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge.The following examples are appropriate for this units: • analysis of responses to case studies and scenarios • observation of role plays • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of collated discoverable documents • review of prepared lists of documents involved in the matter • oral or written questioning to assess knowledge of alternative dispute resolution, relevant court processes, current legislation,

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EVIDENCE GUIDE	
	legal processes and required documentation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legislation**, **regulations and policies may include:	• court rules • court's inherent power to control procedure • judicial interpretation of rules • organisation's policies and procedures • policies and procedures of relevant courts and tribunals • regulations of federal, state and territory courts.
Court personnel may include:	• associate • judge • magistrate • master • prothonotary • registrar.
Options to litigation may include:	• mediation • conciliation • arbitration • negotiation • other practices for alternative dispute resolution.
Steps prior to litigation may include:	• choice of court • choice of mode and place of trial • issue of a writ • letters before action • means for serving an originating process • nature of a cause of action • types of originating process.

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RANGE STATEMENT	
Relevant documentation may include:	• counterclaims • defence • fact sheets • letters before action • notes from interviews • pleadings subsequent to reply • statements of claim • writs.
Designated person may include:	• barrister • legal practice manager • qualified legal practitioner • supervisor.
Organisation's policies and procedures may include:	• code of conduct • discovery procedures • individual procedures adopted by instructing legal practitioner • information sources • liaising with opposing party • office procedural manual • protocol for accommodating specific client needs, e.g. case manager or social worker • protocol for contacting clients, e.g. translator or interpreter • recording information • time-recording procedures • using checklists.
Purpose of discovery may include:	• legal obligations involved in discovery • philosophy of discovery • purpose of first and second schedule • which documents can be included in a court hearing • why documents can be reserved for client-solicitor legal privilege.
Legal obligations may include:	• explaining process to client • listing and making available • listing documents inspected but no longer in an organisation's possession (second schedule) • listing documents involved in pleading.
Administrative tasks may include:	• collating discoverable documents • organising table of contents • contacting client and others for information or relevant

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RANGE STATEMENT	
	documents • reviewing and amending list • contacting opposing party • making appointments • inspecting opposing party's discoverable documents.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - legal administration

Co-requisite units

Co-requisite units		

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BSBLEG515A Apply legal principles in wills and probate matters

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to apply legal principles in wills and probate matters, including preparing wills, powers of attorney and deceased estate documentation. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who apply knowledge of legal principles in wills and probate matters when preparing documentation. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify laws and principles of wills and probate law	1.1. Source ***legislation***, ***regulations and policies*** relevant to wills, probate and administration 1.2. Interpret key principles as they apply to wills, probate and administration matters
2. Enhance professional practice through application of relevant principles of wills and probate law	2.1. Establish ***relevant information*** in the context of the particular matter 2.2. Ensuring ***client's needs*** are met, obtain testamentary, solicitor, deceased estate instructions and other details
3. Prepare and execute documentation	3.1. Draft ***documentation*** according to instructions of ***designated individual*** 3.2. Forward documentation to designated individual for review and sign off in accordance with ***organisation's policies and procedures***
4. Process documentation	4.1. Ensure documents are despatched to ***appropriate agencies*** according to instructions 4.2. Determine types of costs in accordance with legislative and regulatory requirements for costing legal services 4.3. Facilitate liaison and communication with the

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ELEMENT	PERFORMANCE CRITERIA
	parties 4.4. Maintain files, noting critical dates and reminders

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills

• communication skills to:
  • give and interpret instructions
  • clarify discussions
  • provide required information
• literacy skills to:
  • follow complex legal procedures
  • complete documentation
• research skills to:
  • locate necessary information from external sources
  • identify and evaluate status of information
• organisational skills to make arrangements and appointments
• technology skills to:
  • operate office equipment
  • use a range of software packages and precedent bank

Required knowledge

• scope of job role in the context of legislation, regulations and codes of practice in relevant jurisdictions
• relevant court or tribunal processes, current legislation, legal processes and required documentation
• organisation's required policies and procedures for the full range of tasks covered
• legal terminology, including that specific to wills and probate law
• accepted codes of practice relevant to the workplace including those relation to:
  • privacy and confidentiality
  • use of company property
  • duty of care
  • ethical behaviour
  • non-discriminatory practice

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REQUIRED SKILLS AND KNOWLEDGE

• conflict of interest
• compliance with reasonable direction
• legislative requirements, which may relate to:
  • professional practice limitations
  • relevant commonwealth, state or territory legislation
  • schedule of fees and duties payable
  • trust accounts

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • treat clients in a sensitive, discreet and professional manner • conduct all work within accepted codes of conduct that apply to the legal profession • apply the law and its consideration as it relates to wills and probate • prepare appropriate documentation, including wills and probate matters.
Context of and specific resources for assessment	Assessment must ensure access to: • an actual workplace or simulated environment • appropriate legislation and regulations relevant to wills and probate matters • workplace manuals and reference materials, such as company policies, procedural manuals, checklists and sample forms • background information on relevant courts and tribunals, their jurisdiction and behavioural requirements • appropriate technology, such as computers with relevant software • appropriate texts and people with expert knowledge, such as legal practitioners • appropriate legislation and regulations relevant to legal matters concerning wills and probate.

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • review of forms, documents and annexures related to wills and probate prepared for designated individuals for sign-off • oral and written questioning to assess knowledge of legal terminology and practice.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legislation, ***regulations and policies*** relevant to will and probates may include:	• commonwealth, state or territory legislation • government regulations and policies.
Relevant information may include:	• fees to be charged • information on available options • legislative requirements • organisational policies and procedures • roles and responsibilities of parties involved, e.g. solicitor, client, and personal trust officer • taxation issues.
Client's needs may include:	• appointment of executor • custody and guardianship of minor children • details concerning assets and liabilities • details of beneficiaries • information held by notaries • legal and medical opinion • testamentary capacity.

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RANGE STATEMENT	
Documentation may include:	• letters of administration documentation • powers of attorney • probate documentation • wills.
Designated individual may include:	• government representative or other individual charged with legal responsibilities related to wills and probate • legal manager • practice manager • qualified legal practitioner • registrar of the Supreme Court (probate division) • supervisor.
Organisation's policies and procedures may include:	• individual procedures adopted by instructing legal practitioner • protocol for accommodating client's needs, e.g. social worker or interpreter • recording information • security, confidentiality and privacy procedures • use of precedent bank • verifying and authorising information.
Appropriate agencies may include:	• client • government organisations • other legal representatives • Supreme Court (probate division) • trust corporations.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - legal administration

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Co-requisite units

Co-requisite units		

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BSBMED301B Interpret and apply medical terminology appropriately

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to understand and respond to instructions; to carry out routine tasks and communicate with a range of internal/external clients in a medical environment; and to use appropriate advanced medical terminology. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are skilled operators and apply a broad range of competencies in various medical administration contexts. They may exercise discretion and judgment using appropriate knowledge to provide technical advice and support to a team.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Respond appropriately to instructions which contain medical terminology	1.1. Receive, interpret and document ***written and oral instructions*** using ***medical terminology*** 1.2. Use checklists where appropriate 1.3. Ensure own understanding of abbreviations for specialised medical terminology and associated processes 1.4. Ensure own understanding of and adhere to, the ***policies and procedures*** of the enterprise 1.5. Seek ***clarification*** when necessary
2. Carry out routine tasks	2.1. Use medical terminology correctly in the completion of ***routine tasks*** 2.2. Seek assistance from supervisor or experienced staff member as required
3. Use appropriate medical terminology in oral and written communication	3.1. Use appropriate medical terminology as directed, in ***oral communication*** with patients, fellow workers and health professionals 3.2. Use appropriate medical terminology as directed, in ***written communication*** with patients, fellow workers and health professionals 3.3. Present written communication to a ***designated***

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ELEMENT	PERFORMANCE CRITERIA
	person for verification if required 3.4. Spell and pronounce medical terminology correctly

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to interpret policies, signs and instructions and to use correct spelling, grammar and punctuation • learning skills to research and increase own knowledge of medical terminology • communication skills to understand, clarify and explain instructions and procedures.
Required knowledge

• medical terminology, including the fundamental word structure used in medical terms
• basic systems of the body
• organisational documentation and recording requirements
• source of information relating to medical terminology
• key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • anti-discrimination legislation
  • ethical principles
  • privacy laws
  • Freedom of Information Act.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • using medical terminology in written and verbal communication • identifying and appropriately using abbreviations for medical terms and associated processes • managing own learning to maintain knowledge of up-to-date medical terminology • knowledge of relevant legislation from all levels of government that impacts on business operations, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of documentation and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning • observation of performance in role plays • review of written communication with patients for use of appropriate medical terminology • oral or written questioning to assess knowledge of workplace emergencies, risks and hazards • assessment of documentation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration or medical services administration units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Written and oral instructions may include:	• diary entries • drugs orders • instructions for postoperative care • notices • occupational health and safety (OHS) signs and instructions • patient notes • referrals • routine reports • telephone calls • test results • theatre lists • verbal instructions
Medical terminology may include:	• abbreviations for medical and pharmacological terms (e.g. BCG, HRT, IVP, tab, ante, ung) • causes to changes in the systems of the body (e.g. changes to the musculo-skeletal system may include inflammation due to repeated strain on the system) • common medical conditions including illnesses, injuries and diseases • departments/sections in a hospital • health insurance terminology • interrelated functions of the body, locations and diseases (e.g. functions of the skeletal system, locations of skeletal injuries, skeletal diseases • knowledge of medical specialties and the names and titles of doctors working in specialist fields • medical conditions • medical equipment and instruments • medical investigations and procedures • Medicare terminology

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RANGE STATEMENT	
	• medications • referrals • terms to describe onset and/or nature of disease
Policies and procedures may include:	• abiding by local, state/territory and commonwealth legislation • accessing and updating files • cleanliness and hygiene • correspondence format • emergency procedures • following instructions • information specific to the enterprise • office practice manual • OHS • Royal Australian College of General Practitioners (RACGP) Code of Practice for the Management of Health Information in General Practice • RACGP Entry Standards for General Practices • telephone protocol • recording information • security, confidentiality and privacy procedures
Clarification may be sought from:	• drug and prescription information sources/databases • experienced staff member/s • medical dictionary • office practice manual • relevant handbook • supervisor
Routine tasks may include:	• answering patient enquiries • contributing to meetings • dealing with patient complaints • entering patient details into computer system • filing patient notes • maintaining information to assist patients • maintaining patient information • maintaining reception area, waiting room, consultation room • ordering stock (e.g. stationery, medical supplies) • preparing medical equipment

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RANGE STATEMENT	
	• preparing reports • processing correspondence • producing a range of complex medical documents (e.g. patient history, case report) • providing information to patients • receiving and making telephone calls • receiving visitors and patients • recording information • storing and maintaining security of drugs • word processing
Oral communication may include:	• answering routine telephone enquiries • communicating with a range of medical/hospital professionals on patient related matters • confirming appointments • dealing with difficult patients/customers • paging staff • reporting to staff at meetings • transferring calls • verbal instructions
Written communication may include:	• appointment diaries, cards • case reports • complex correspondence to a range of medical/hospital professionals on patient related matters • forms • letters • memoranda • minutes • patient histories • patient history questionnaires • patient records • telephone messages
Designated person may include:	• doctor • practice manager • supervisor

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Medical Services Administration

Co-requisite units

Co-requisite units		

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BSBMED302B Prepare and process medical accounts

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide advice to patients regarding fee structures and process referrals, and to prepare and process medical accounts for a range of patients. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are skilled operators and apply a broad range of competencies in various medical administration contexts. They may exercise discretion and judgment using appropriate knowledge to provide technical advice and support to a team.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Provide advice to patients about fee structure	1.1. Identify and advise patients of schedule of ***fees*** for different services 1.2. Advise patients regarding ***entitlements and rebates*** 1.3. Schedule ***medical appointments*** using appropriate booking and account ***systems***
2. Process referrals to specialist practitioners	2.1. Check referrals to ensure validity 2.2. Follow correct ***procedures for referral*** 2.3. File referral letters according to legislation and enterprise ***policies and procedures***
3. Prepare medical accounts for bulk billed and private patients	3.1. Accurately follow ***procedures for billing*** based on ***account type*** 3.2. Identify and cost procedures which are not eligible for Medicate rebate 3.3. Select and complete ***appropriate account and billing documentation*** according to enterprise and legislative requirements 3.4. Follow procedures for preparing Veterans' Affairs, workers compensation and motor vehicle third party accounts accurately 3.5. Forward medical account to ***designated person or organisation*** according to ***legislation*** and ***account processing procedures***

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ELEMENT	PERFORMANCE CRITERIA
4. Process accounts	4.1. Receive and document payments 4.2. Prepare and issue receipts to person or authority according to legislation and office policies and procedures 4.3. Reconcile Medicare payments with claims made by the medical practice 4.4. Follow-up overdue accounts 4.5. Provide and ***store financial records*** and data in accordance with policies and procedures of the medical practice

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to listen and follow instructions and communicate professionally and clearly with patients, allowing for patients difficulties in understanding
- literacy skills to read and understand financial procedures and documentation
- numeracy skills to work with basic financial and accounting procedures, file documents and interpret data in tables, graphs and diagrams
- proofreading skills to check calculations, invoices and fee structures.

Required knowledge

- health care system
- Medicare entitlements, schedule book, MedClaims
- public and private health insurance systems
- provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - ethical principles
  - privacy laws
  - Freedom of Information Act
- compensation systems, including workers compensation
- procedures for patients without Medicare card or number.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • communicating information on a range of entitlements and benefits • using appointment and referral systems to ensure accuracy of billing records and processes • applying knowledge of the healthcare system and practice polices and procedures to ensure timely and accurate collection of accounts.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of documentation and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of workplace emergencies, risks and hazards • observation of performance in role plays • assessment of documentation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBITU306ADesign and produce business documents.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Fees may relate to:	• advice to patients • AMA recommendations • Department of Veterans' Affairs • insurance medical reports • Medicare (hospital, medical) • other items sold to patients (e.g. immunisations, dressings) • other services provided by the clinic • provision of copies of medical files • provision of legal and other reports • provision of repeat prescriptions • refund only • scheduled fees • services provided to Divisions of General Practice • services with no fee structures • Transport Accident Commission • workers compensation
Entitlements and rebates may relate to:	• Department of Veteran's Affairs • Medicare • private health funds (level of cover, restrictions) • Transport Accident Commission • workers compensation
Medical appointments may include:	• block • limited block • sequential
Systems may include:	• software-based accounting and appointment systems • print-based accounting and appointment

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RANGE STATEMENT	
	systems
Procedures for referral may include:	• checking for 'acceptable evidence' (e.g. name of referring doctor, address or service provider number of the referring doctor) • checking that the referral is valid (e.g. length of time stated in the referral has not been exceeded) • entering patient details into computer system • filing patient notes • maintaining patient information • recording information • word processing
Policies and procedures may include:	• abiding by state/territory and federal legislation • accessing and updating files • bank reconciliations and preparing banking documentation • correspondence format • end of session, end of day, end of week, end of month and end of year procedures • following instructions • information specific to the enterprise • management of provider numbers for doctors • managing particular Medicare problems (e.g. lost cards, newborns, foreign national, new card numbers, patients separating from family cards) • office practice manual • RACGP Code of Practice for the Management of Health Information in General Practice • RACGP Entry Standards for General Practices • recording information • security, confidentiality and privacy procedures
Procedures for billing may include:	• additional information • attachments • claims • dates and names • Department of Veteran's Affairs items of service • descriptions of services

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RANGE STATEMENT	
	• explanatory notes • forms • Health Care cards • hospital • item numbers of services • levels of fees • medical certificates • Medicare item numbers • Medicare provider numbers • name of service provider • patient details • payment options • referrals • services that are consultation items, and those that are procedural items • treatment vouchers • vouchers • workers compensation
Account type may include	• bulk billing • private
Appropriate account and billing documentation may include:	• accounts • enterprise's templates (e.g. for accounts, accompanying reports) • forms • invoices • receipts • reports • statements • vouchers
Designated person or organisation may include:	• Australian Medical Association • Department of Veteran's Affairs • guardian • Health Insurance Commission • patient • Transport Accident Commission • workers compensation organisations
Legislation may relate to:	• consent • duty of care • equal opportunity • malpractice

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RANGE STATEMENT	
	• negligence • occupational health and safety (OHS) • privacy • relevant state/territory and commonwealth Acts • workers compensation
Account processing procedures may relate to:	• additional information • attachments • claims • dates and names • debt collection • descriptions of services • explanatory notes • forms • Health Care cards • item numbers of services • levels of fees • medical certificates • Medicare item numbers • Medicare provider numbers • name of hospital • name of service provider • overdue accounts • patient details • payment options • receipts • reconciliation of claims and payments • referrals • vouchers • workers compensation
Storing procedures may relate to:	• date order • period of storage • storage conditions
Financial records may relate to:	• computerised billing software • credits and debit amounts • daily/weekly summaries/reports • general ledger • Medclaims (electronic billing of Medicare) • overdue accounts • overdue debtors list/report

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RANGE STATEMENT	
	• payment history • payments received • receipt book • statements • statistics • types of payments and related documentation/reports (e.g. credit card payments, EFTPOS)

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Medical Services Administration

Co-requisite units

Co-requisite units		

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BSBMED303B Maintain patient records

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to maintain patient records within an existing medical records management system, under supervision. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who will be assigned tasks by a senior receptionist or practice manager. They are skilled operators and apply a broad range of competencies in various medical administration contexts. They may exercise discretion and judgement in accessing and maintaining patient records while fully respecting patient privacy and the confidentiality of their details. BSBMED401B Manage patient record keeping system, covers the management of the system within which this person works.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify and clarify own role and procedures for patient record keeping	1.1. Determine own role and responsibilities within patient record keeping ***system*** through consultation with ***relevant personnel*** or via organisational policy and procedures manual 1.2. Access documented procedures for patient record keeping system and read for understanding 1.3. Seek clarification with relevant personnel of unclear or ambiguous procedures
2. Access patient records	2.1. Gain access to patient records to facilitate patient visit 2.2. Check currency and accuracy of patient demographic and personal details 2.3. Create new records according to enterprise protocols 2.4. Check records following patient visits, for ***practitioners' instructions*** related to follow-up action

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ELEMENT	PERFORMANCE CRITERIA
	2.5. Store patient files following organisational policy and procedures
3. Help maintain records	3.1. Make ***checks*** of patient files 3.2. Carry out ***archiving*** of patient files as required 3.3. Transfer patient files to another health facility upon ***appropriate request for patient information***
4. Monitor and review own role	4.1. Monitor and review own role and responsibilities in maintaining patient records to identify opportunities for improvements to system and own work practices 4.2. Make recommendations to relevant personnel for improvements to the established procedures and processes for maintaining patient records

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- planning and organising skills to access and maintain records
- communication skills to receive and clarify instructions
- analysis skills to identify and address gaps in own knowledge.

Required knowledge

- occupational health and safety (OHS), for example:
  - manual lifting of materials
  - ergonomics associated with using computers and own work station
- relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - ethical principles
  - privacy laws
  - Freedom of Information Act.
  - specific legislation related to patient records
- organisation policies and procedures related to:
  - patient record keeping
  - privacy and confidentiality

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REQUIRED SKILLS AND KNOWLEDGE
• access to records • filing systems and record management processes • medical coding as required to access and maintain patient records.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • using record and file management systems to ensure organisation and accuracy of practice files • communicating with internal staff and other external health care providers to maintain accuracy of patient data • applying knowledge of the healthcare system, and practice policies and procedures to ensure accessibility of records.
Context of and specific resources for assessment	Assessment must ensure: • access to records system • documented procedures • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of new records created • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations

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EVIDENCE GUIDE	
	• oral or written questioning to assess knowledge of workplace emergencies, risks and hazards • observation of performance in role plays • assessment of archived patient files • assessment of recommendations made for improvements to the procedures and processes for maintaining patient records.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration or medical services administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
System may include:	• print-based records management systems • software and hardware-based records management systems
Relevant personnel may include:	• administrative manager • health professionals • manager of facility • own supervisor • partners in business
Practitioners' instructions may include:	• filing documents in records • making further appointments with health professionals within the facility • referral to another health professional • request for a letter of referral to be prepared
Checks of patient files may include:	• checking on a pre-determined cycle • checking on specified dates • ensuring files are neat, tidy and correct

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RANGE STATEMENT	
	• ensuring files are stored in correct order (alphabetical, numerical, alphanumeric)
Archiving may include:	• archiving on direction and under supervision • file storage using appropriate archiving options such as boxes, external storage facility, electronic scanning and imaging • identification of files for archiving • removal of files from system

Appropriate request for patient information refers to:	• legitimate request for patient information agreed to by patient and for purposes of furthering treatment regime with another health facility and within legislative requirements including:
	  • approval by relevant health practitioner
	  • Freedom of Information Act
	  • organisational policy and procedures
	  • Privacy Act

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Medical Services Administration

Co-requisite units

Co-requisite units		

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BSBMED304B Assist in controlling stocks and supplies

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide assistance in stock control processes within a medical environment. This involves assisting in maintaining stock levels, storing stock, stocktaking and disposing of out of date stock. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who provide assistance in controlling required levels of stocks and supplies in a medical administration context or work area. The person offers assistance under supervision and all work is undertaken in accordance within legislative requirements, Australian and industry standards and codes of practice, and in line with organisational policies, procedures and specific requirements.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Determine own role in stock control processes	1.1. Determine own role in ***stock control processes*** by consulting with manager or supervisor 1.2. Access documented procedures for stock control and read for understanding 1.3. Seek clarification with relevant personnel of unclear or ambiguous procedures
2. Assist in maintaining stock levels	2.1. Monitor stock levels against required levels 2.2. Order stock in a timely manner or in accordance with ordering cycles, to ensure continuity of supplies 2.3. Identify potential shortfalls in stock levels and take action to ensure stock is replenished in a timely manner 2.4. Check orders against enterprise documentation and take appropriate ***actions*** where any shortfall is identified 2.5. Complete and store documentation for maintenance of stock levels

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ELEMENT	PERFORMANCE CRITERIA
3. Store stock	3.1. Unpack stock and check against order for condition and currency 3.2. Identify damaged or missing stock and take action to replace it 3.3. Store stock according to established storage systems 3.4. Identify and store stock requiring ***specialised storage*** 3.5. Rotate stock to minimise stock reaching expiry or use-by-date
4. Assist in stocktaking	4.1. Provide assistance in stocktaking to identify, count, move and locate items 4.2. Complete and store stocktaking documentation 4.3. Assist with other stocktaking actions as directed
5. Assist in disposal of out of date stock and recalls	5.1. Dispose of stock marked for disposal according to legislation and other industry specific or manufacturer requirements and under direction of supervisor 5.2. Complete and store required documentation of disposal of out-of-date stock

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- numerical skills to assess stock levels and assess deliveries for completion
- problem solving skills to analyse storage and disposal requirements of stock.

Required knowledge

- occupational health and safety (OHS), for example:
  - safe handling of specific dangerous goods (as relevant for enterprise)
  - manual handling
- relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - ethical principles

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REQUIRED SKILLS AND KNOWLEDGE
• privacy law • Freedom of Information Act • safe disposal of out-of-date stock • recording of stock usage of prescribed substances and dangerous goods, where relevant • enterprise policies and procedures for stock control including record keeping requirements for: • stock levels • stocktaking • disposal of out-of-date stock.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documenting three activities relating to maintenance and ordering of stock and supplies, which may include: • stocktaking reports • communicating with suppliers to address shortfalls in orders • stock rotation • disposal of out-of-date stock • knowledge of relevant legislation from all levels of government.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to workplace records and processes for stock control • access to security arrangements for stock and

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EVIDENCE GUIDE	
	supplies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of stock orders • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of relevant legislation • observation of performance in role plays • assessment of stored stock and store stocktaking documentation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration or medical services administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Stock control processes may include:	• cycles for stocktaking and stock rotation • levels of stock and supplies to be held on premises • security arrangements for stock and supplies • specialised storage conditions for stock and supplies

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RANGE STATEMENT	
Actions may include:	• contacting the supplier • reporting to supervisor to take action
Specialised storage may include:	• refrigeration or keeping in a cool environment • security and special handling for dangerous goods • transferring to specialised containers for storage

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Medical Services Administration

Co-requisite units

Co-requisite units		

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BSBMED305B Apply the principles of confidentiality, privacy and security within the medical environment

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to apply principles and requirements relating to confidentiality, privacy and security to own work within the medical environment. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a medical environment required to maintain confidentiality, privacy and security under legislation, and organisational policies and procedures. It covers working within accepted codes of conduct and following confidentiality, privacy provisions and security provisions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Work within accepted codes of conduct	1.1. Ensure work is reviewed and approved by a health practitioner or senior administrator who has delegated task/s 1.2. Keep records up-to-date and complete tasks as required, neatly, accurately and in a timely manner 1.3. Seek clarification with ***relevant personnel*** of unclear or ambiguous procedures 1.4. Treat patients, colleagues and health practitioners with respect 1.5. Refer health related matters raised by patients back to medical practitioners 1.6. Take care to behave with honesty and integrity at all times 1.7. Communicate conflict of interest or potential conflict of interest promptly to manager or supervisor
2. Follow confidentiality and privacy procedures	2.1. Assess information and requests for information with regard to ***what is and what is not disclosable*** 2.2. Use discretion and judgement in all communications 2.3. Discuss patient-related matters within the confines of the facility and with appropriate personnel only 2.4. Seek advice and clarification with relevant personnel where potential confidentiality issues arise in dealings with patients, their families and others

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ELEMENT	PERFORMANCE CRITERIA
3. Follow security procedures	3.1. Store and appropriately secure patient records and other confidential documentation 3.2. Clearly label and store securely according to organisational policies and procedures, all documents required by legislation to be stored for certain periods 3.3. Ensure drugs, equipment and other materials requiring secure storage and potentially posing an OHS threat to others, are stored securely at all times

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to clarify requirements and to resolve difficult issues with patients, their families and others
- planning and organising skills to access and secure records.

Required knowledge

- occupational health and safety (OHS) for example:
  - safe handling of specific dangerous goods (as relevant for enterprise)
  - manual handling
- relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - ethical principles
  - privacy laws
  - Freedom of Information Act
- enterprise policies and procedures for confidentiality, privacy and security.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• documenting three examples of activities in which confidentiality, privacy and security are maintained, which may include:
	  • examples of actions taken
	  • how difficult situations were addressed
	  • how guidance has been provided regarding confidentiality, privacy and security and clarification obtained on such matter when required
	• knowledge of relevant legislation from all levels of government.

Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of scenarios working with confidentiality, privacy and security issues.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of record keeping • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of relevant legislation and impact on own work routine • observation of performance in role plays • assessment of labelling and storage of patient records and other confidential documentation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

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EVIDENCE GUIDE	
	• BSBMED303B Maintain patient records

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant personnel may include:	• health practitioners • other specialised staff • partners in the business • supervisor/manager

What is and what is not disclosable will be:	• determined by the Privacy Act, the Freedom of Information Act, organisational policies and procedures, and guidelines in the practice manual which may include:
	  • details of patients' conditions
	  • financial information
	  • names and addresses of patients
	  • passwords
	  • security arrangements

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Medical Services Administration

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Co-requisite units

Co-requisite units		

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BSBMED401B Manage patient record keeping system

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage a patient record system within a medical environment and to supervise others. It covers clarifying roles and responsibilities, managing the operation of a patient records system, and reviewing and improving the system. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals managing an existing record keeping system (and sub systems within the overall system) in a medical context. It may involve supervising the work of other personnel who implement the system and maintain patient records day to day. It also involves working with users of the system such as the health practitioners in the facility. The unit does not cover the design of a new system but does cover reviews and improvements to an existing system. BSBMED303B Maintain patient records, covers the day to day implementation of the system.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Clarify how patient records system operates	1.1. Access policies and procedures for patient records 1.2. Consult ***relevant personnel*** about how the ***system*** operates 1.3. Determine roles and responsibilities for the system operations 1.4. Communicate roles and responsibilities for system operations to relevant personnel
2. Manage operation of patient records system	2.1. ***Supervise*** staff maintaining patient records 2.2. Provide staff maintaining patient records with training as required 2.3. Regularly consult staff using patient records about system efficacy 2.4. Maintain integrity of patient records

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ELEMENT	PERFORMANCE CRITERIA
	2.5. Maintain security of patient records 2.6. Stress importance of confidentiality of patient records to all staff, including self, who handle or have access to patient files 2.7. Provide ***authorisation of transfer of records*** from facility according to practice protocols 2.8. Archive records as appropriate
3. Review and improve patient records system	3.1. Monitor and review implementation of the system to identify improvements 3.2. Make recommendations to relevant personnel for system improvements 3.3. Implement approved recommendations 3.4. Supervise staff maintaining patient records to implement changes 3.5. Plan and deliver any required training for staff to implement changes made to the system

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- management skills to supervise staff
- analysis skills to continuously improve procedures through reviewing, and identifying and implementing improvements.

Required knowledge

- occupational health and safety (OHS), for example:
  - manual lifting
  - ergonomics associated with using computers and own work station
- relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - consumer laws including appropriate state legislation
  - ethical principles
  - privacy laws
  - statutory regulations for records

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REQUIRED SKILLS AND KNOWLEDGE

• specific legislation related to patient records
• enterprise policies and procedures related to:
  • patient record keeping including archiving and records transfer
  • privacy and confidentiality
  • access to records
• filing systems and record management processes
• medical coding as required to access and maintain patient records.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • managing a patient record keeping system over a significant period • documenting how records have been accessed and archived by staff or self • demonstrating how records have been provided to support relevant medical activities • knowledge of relevant legislation from all levels of government.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of documents and records for archiving • access to records system • documented procedures.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace

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EVIDENCE GUIDE	
	reports of on-the-job performance by the candidate • review of archived records • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • oral or written questioning to assess knowledge of filing systems and record management processes • observation of performance in role plays.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other general administration or medical services administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant personnel may include:	• chief executive officer, director or manager of the business • external bodies including peak industry organisations • health professionals using the system • partners in the business • reception staff • staff managing patient records
System may include:	• software and hardware-based records management systems • print-based records management systems
Supervising staff may include:	• coaching/mentoring • documenting procedures and processes • formal training
Authorisation of transfer of	• organisational policy

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RANGE STATEMENT	
records may occur in relation to:	• organisational procedure • relevant laws

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Medical Services Administration

Co-requisite units

Co-requisite units		

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BSBMGT401A Show leadership in the workplace

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to work with teams and individuals, their standard of conduct and the initiative they take in influencing others. At this level, work will normally be carried out within routine and non routine methods and procedures which require the exercise of some discretion and judgement. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Frontline management provides the first level of leadership within the organisation. This unit applies to people who are making the transition from being a team member, to taking responsibility for the work and performance of others. Frontline managers have a strong influence on the work culture, values and ethics of the teams they supervise. As such it is important that frontline mangers model good practice, professionalism and confidently represent their organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Model high standards of management performance and behaviour	1.1. Ensure management performance and behaviour meets the organisation's requirements 1.2. Ensure management performance and behaviour serves as a positive role model for others 1.3. Develop and implement performance plans in accordance with organisation's goals and objectives 1.4. Establish and use key performance indicators to meet organisation's goals and objectives
2. Enhance organisation's image	2.1. Use ***organisation's standards and values*** in conducting business 2.2. Question, through established communication channels, standards and values considered to be damaging to the organisation 2.3. Ensure personal performance contributes to developing an organisation which has integrity and

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ELEMENT	PERFORMANCE CRITERIA
	credibility
3. Make informed decisions	3.1. Gather and organise information relevant to the issue/s under consideration 3.2. Facilitate individuals and teams active participation in decision making processes 3.3. Examine options and assess associated risks to determine preferred course/s of action 3.4. Ensure decisions are timely and communicate them clearly to individuals and teams 3.5. Prepare plans to implement decisions and ensure they are agreed by relevant individuals and teams 3.6. Use ***feedback processes*** effectively to monitor the implementation and impact of decisions

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication and presentation skills to represent the organisation, to explain its work to others and to model professionalism • decision making skills to demonstrate good judgement and follow through.
Required knowledge
• basic theory of group behaviour • leadership styles and concepts.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • articulation of organisational values and expectations of behaviour • instances where leadership and decision making have been demonstrated and which have led to positive changes in the workplace • knowledge of leadership styles and concepts.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • review of performance plans • oral or written questioning to assess knowledge of leadership styles • evaluation of communication of expectations, roles and responsibilities • review of documentation examining options and assessing associated risks to determine preferred course/s of action.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Frontline Management.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised

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RANGE STATEMENT	
wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Organisation's standards and values will be:	• stated or implied by the way the organisation conducts its business
Feedback processes may be:	• formal or informal • from internal or external sources

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBMGT402A Implement operational plan

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to implement the operational plan by monitoring and adjusting operational performance, producing short term plans for the department/section, planning and acquiring resources and providing reports on performance as required. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Frontline managers are actively engaged in planning activities to achieve the measurable, stated objectives of the team and the organisation. This key role is carried out to provide safe, efficient and effective products and services to customer satisfaction within the organisation's productivity and profitability plans. At this level, work will normally be carried out within routine and non routine methods and procedures, which require planning, evaluation, leadership and guidance of others.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Implement operational plan	1.1. Collate, analyse and organise details of ***resource requirements*** in consultation with ***relevant personnel***, ***colleagues and specialist resource managers*** 1.2. Implement ***operational plans*** to contribute to the achievement of organisation's performance/business plan 1.3. Identify and use ***key performance indicators*** (KPIs) to monitor operational performance 1.4. Undertake ***contingency planning*** and ***consultation processes*** 1.5. Provide assistance in the development and presentation of proposals for resource requirements in line with operational planning processes
2. Implement resource acquisition	2.1. Recruit and induct employees within ***organisation's policies***, ***practices and procedures*** 2.2. Implement plans for acquisition of physical

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ELEMENT	PERFORMANCE CRITERIA
	resources and services within organisation's policies, practices and procedures and in consultation with relevant personnel
3. Monitor operational performance	3.1. Monitor ***performance systems and processes*** to assess progress in achieving profit/productivity plans and targets 3.2. Analyse and use budget and actual financial information to monitor profit/productivity performance 3.3. Identify unsatisfactory performance and take prompt action to rectify the situation according to organisational policies 3.4. Provide mentoring, coaching and supervision to support individuals and teams to use resources effectively, economically and safely 3.5. Present recommendations for variation to operational plans to the ***designated persons***/***groups*** and gain approval 3.6. Implement ***systems***, ***procedures and records*** associated with performance in accordance with organisation's requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- coaching and mentoring skills to provide support to colleagues
- literacy skills to access and use workplace information, and to prepare reports
- planning and organising skills to monitor performance and to sequence work of self and others to achieve planned outcomes.

Required knowledge

- principles and techniques associated with:
  - contingency planning
  - methods for monitoring and reporting on performance
  - monitoring and implementing operations and procedures
  - problem identification and methods of resolution

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REQUIRED SKILLS AND KNOWLEDGE
• relevant budgeting and financial analysis, interpretation and reporting requirements • resource management systems at the tactical implementation level • resource planning and acquisition • tactical risk analysis including identification and reporting requirements.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • ability to monitor and adjust operational performance, produce short-term plans for the department or section, plan and acquire resources, and provide reports on performance as required • knowledge of principles and techniques associated with monitoring and implementing operations and procedures.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation outlining contingency planning and consultation processes undertaken • demonstration of techniques in managing performance • evaluation of mentoring, coaching and supervision provided to support individuals and teams to use resources effectively, economically and safely.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Frontline Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Resource requirements may refer to:	• goods and services to be purchased and ordered • human, physical and financial resources - both current and projected • stock requirements and requisitions
Relevant personnel, ***colleagues and specialist resource managers*** may include:	• colleagues and specialist resource managers • managers • occupational health and safety committees and other people with specialist responsibilities • other employees • people from a wide range of social, cultural and ethnic backgrounds, and people with a range of physical and mental abilities • supervisors
Operational plans may refer to:	• organisational plans • tactical plans developed by the department or section to detail product and service performance
Key performance indicators may refer to:	• measures for monitoring or evaluating the efficiency or effectiveness of a system, and which may be used to demonstrate accountability and to identify areas for improvements

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RANGE STATEMENT	
Contingency planning may refer to:	• contracting out or outsourcing human resources and other functions or tasks • diversification of outcomes • finding cheaper or lower quality raw materials and consumables • increasing sales or production • recycling and re-use • rental, hire purchase or alternative means of procurement of required materials, equipment and stock • restructuring of organisation to reduce labour costs • risk identification, assessment and management processes • seeking further funding • strategies for reducing costs, wastage, stock or consumables • succession planning
Consultation processes may refer to:	• mechanisms used to provide feedback to the work team in relation to outcomes of consultation • meetings, interviews, brainstorming sessions, email/intranet communications, newsletters or other processes and devices which ensure that all employees have the opportunity to contribute to team and individual operational plans
Organisation's policies, ***practices and procedures*** may include:	• organisational culture • Standard Operating Procedures • organisational guidelines which govern and prescribe operational functions, such as the acquisition and management of human and physical resources • undocumented practices in line with organisational operations

Performance systems and processes may refer to:	• informal systems used by frontline managers for the work team in the place of existing organisation-wide systems
	• formal processes within the organisation to measure performance, such as:
	  • feedback arrangements
	  • individual and teamwork plans

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RANGE STATEMENT	
	• KPIs • specified work outcomes
Designated persons*/*groups may include:	• other affected work groups or teams and groups designated in workplace policies and procedures • those who have the authority to make decisions and/or recommendations about operations such as workplace supervisors, other managers
Systems*, *procedures and records may include:	• databases and other recording mechanisms for ensuring records are kept in accordance with organisational requirements • individual and team performance plans • organisational policies and procedures relative to performance

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBMGT403A Implement continuous improvement

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to implement the organisation's continuous improvement systems and processes. Particular emphasis is on using systems and strategies to actively encourage the team to participate in the process, monitoring and reviewing performance, and identifying opportunities for further improvements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Frontline managers have an active role in implementing the continuous improvement process to achieve the organisation's objectives. Their position, closely associated with the creation and delivery of products and services, means that they have an important role in influencing the ongoing development of the organisation. At this level, work will normally be carried out within routine and non routine methods and procedures, which require planning and evaluation, and leadership and guidance of others.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Implement continuous improvement systems and processes	1.1. Implement ***systems*** to ensure that individuals and teams are actively encouraged and supported to ***participate in decision making processes***, assume responsibility and exercise initiative 1.2. Communicate the organisation's ***continuous improvement processes*** to individuals and teams, and obtain feedback 1.3. Ensure effective ***mentoring and coaching*** allows individuals and teams to implement the organisation's continuous improvement processes
2. Monitor and review performance	2.1. Use the organisation's systems and ***technology*** to monitor and review progress and to identify ways in which planning and operations could be improved 2.2. Improve ***customer service*** through continuous improvement techniques and processes

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Formulate and communicate recommendations for adjustments to those who have a role in their development and implementation
3. Provide opportunities for further improvement	3.1. Implement ***processes to ensure that team members are informed of savings and productivity/service improvements*** in achieving the business plan 3.2. Document work performance to aid the identification of further opportunities for improvement 3.3. Manage records, reports and recommendations for improvement within the organisation's systems and processes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication skills to:
  • coach and mentor team members
  • gain the commitment of individuals and teams to continuously improve
• innovation skills to design better ways of performing work.

Required knowledge

• principles and techniques associated with:
  • benchmarking
  • best practice
  • change management
  • continuous improvement systems and processes
  • quality systems.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the

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EVIDENCE GUIDE	
performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • taking active steps to implement, monitor and adjust plans, processes and procedures to improve performance • supporting others to implement the continuous improvement system/processes, and to identify and report opportunities for further improvement • knowledge of principles and techniques associated with continuous improvement systems and processes.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge of principles and techniques associated with change management • review of how the organisation's continuous improvement processeswascommunicated to individuals and teams • review of documentation of work performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Frontline Management.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Systems may refer to:	• forums, meetings • newsletters and reports • organisational policies and procedures • web-based communication devices
Participation in decision making processes may include:	• feedback in relation to outcomes of the consultative process • processes which ensures all employees have the opportunity to contribute to organisational issues
Continuous improvement processes may include:	• cyclical audits and reviews of workplace, team and individual performance • evaluations and monitoring of effectiveness • implementation of quality systems, such as International Standardization for Organization (ISO) • modifications and improvements to systems, processes, services and products • policies and procedures which allow the organisation to systematically review and improve the quality of its products, services and procedures • seeking and considering feedback from a range of stakeholders
Mentoring and coaching may refer to:	• providing assistance with problem-solving • providing feedback, support and encouragement • teaching another member of the team, usually focusing on a specific work task or skill
Technology may include:	• computerised systems and software such as databases, project management and word processing • telecommunications devices • any other technology used to carry out work roles and responsibilities

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RANGE STATEMENT	
Customer service may be:	• internal or external • to existing, new or potential clients
Processes to ensure that team members are informed of savings and productivity/service improvements may refer to:	• email/intranet, newsletters or other communication devices • newsletters and bulletins • staff reward mechanisms • team meetings

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBMGT404A Lead and facilitate off site staff

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to supervise staff who perform agreed duties at an alternative site (usually home) during some or all of the scheduled work hours. OFF SITE WORK is a flexible employment option that meets all legal and regulatory employment requirements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to frontline managers who may be supervisors or team leaders who have responsibility for overseeing the work of off site staff. Increasingly, managers and staff are at different locations and the opportunities for face to face communication are reduced. In these cases managers must develop different techniques and approaches to ensure quality standards and work outcomes are met.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Facilitate off site work outcomes	1.1. Clarify ***roles and responsibilities*** of ***off-site work*** supervisors with management and off-site staff 1.2. Provide leadership and direction to off-site staff to foster independent self-managed work practices that address agreed outcomes in terms of quality and milestones 1.3. Ensure that work objectives for off-site staff are linked to measurable targets and include agreed timeframes 1.4. Use participative, transparent decision making to review work allocation responsibilities of off-site staff and related on-site staff
2. Support off site staff	2.1. Provide guidance to off-site staff to establish and maintain a supportive working environment in accordance with ***legal and organisational***

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ELEMENT	PERFORMANCE CRITERIA
	requirements 2.2. Assign key personnel/mentors to support off-site staff and to provide a link between off-site staff and the organisation 2.3. Establish and maintain effective working relations between on-site staff and off-site staff through regular meetings and other occasions used to build organisational culture and values
3. Manage off site staff performance	3.1. Plan and conduct ***regular meetings*** to determine individual progress, identify needs, clarify and solve issues, and provide networking opportunities 3.2. Evaluate performance against agreed goals and targets, and address in accordance with organisational policy and practice 3.3. Address problems in work performance through constructive solutions identified with off-site staff 3.4. Ensure evidence relating to performance is valid, documented and evaluated to identify learning and development requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to negotiate and manage conflict and to manage performance • computer skills to undertake online communication • literacy skills to interpret requirements and to document performance management outcomes • numeracy skills to determine time lines and milestones.
Required knowledge
• e-work policy and practices • legal and ethical requirements for e-work • occupational health and safety • relationship management.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • strategies to facilitate work and provide support for off-site staff • methods for providing feedback and adapting the performance management system so that work outcomes are met • knowledge of legal and ethical requirements for e-work.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate
Guidance information for assessment	

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and

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RANGE STATEMENT	
regional contexts) may also be included.	
Role and responsibilities of supervisors of off-site ***work*** supervisors may include:	• assessing progress • coaching • early identification and handling of problems • flexibility in supervisory practices • focus on quality of work rather than time spent • goal setting • including off-site staff in office meetings, both official and social • off-site visits • management based on outcomes • recruitment and selection • regular feedback • telephone supervision
Off-site work may include:	• home-based work where staff members work at home with access to various types of employer equipment, databases and networks • hotelling or hot-desking where employees work out of the office for significant periods of time but can reserve a workspace, for example office or workstation in the organisation's facilities • staff who travel and work in remote locations • telecommuting where employees are physically situated at an alternative workplace such as a home office and continue to carry out their duties • virtual office, which is a remote electronic work station for employees or work station for self-employed workers
Legal and organisational requirements of off-site work may include:	• business contents insurance against damage and theft • other insurance e.g. travel • public liability • taxation law • workers compensation for work related injury/accident
Regular meetings may involve:	• meeting with mentor/supervisor or with other team members or stakeholders • periodic meetings at the off-site workplace • periodic meetings at the organisation's

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RANGE STATEMENT	
	premises

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBMGT405A Provide personal leadership

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to display high levels of personal leadership and to be a role model within the work environment. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to staff who have a leadership role. It applies to the manner in which they conduct themselves, the initiative they take in influencing, assisting and guiding others, and to the way they manage their own role and responsibilities. Competence in this unit requires consistently high levels of self management and behaviours that exemplify the desired standards within the organisation. This involves the candidate earning the trust and respect of the team and acting as a role model at all times. This role is undertake by staff with managerial responsibility (people management or operational/ specialist management).

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Influence individuals and teams in a positive manner	1.1. Encourage, value and reward individual and team efforts and contributions 1.2. Promote accountability of work undertaken by individuals/teams by communicating roles, responsibilities and expectations clearly 1.3. Gain positive acceptance and support for information and ideas from the team
2. Make informed decisions	2.1. Gather and organise information relevant to the issue/s under consideration 2.2. Involve individuals/teams to actively participate in the decision making process 2.3. Determine preferred course of action after risks and options are examined and assessed 2.4. Communicate decisions to individuals/teams clearly

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ELEMENT	PERFORMANCE CRITERIA
	and in a timely manner 2.5. Prepare plans to implement decisions after agreement by relevant individuals/team 2.6. Monitor the implementation and impact of decision using reliable feedback processes
3. Enhance the image of the enterprise	3.1. Conduct business in a way that is consistent with ***enterprise standards and values*** 3.2. Note and promptly discuss with the appropriate person, any inappropriate values and standards exhibited within the organisation, using established communication channels 3.3. Consistently display a very high standard of ***personal presentation*** in line with organisational expectations and policies
4. Demonstrate high standards of personal and management performance	4.1. Contribute to developing a reputable organisation which has integrity and credibility, through personal performance and behaviours 4.2. Ensure standards of personal and management performance are consistent with enterprise requirements 4.3. Provide a positive role model for others through ***personal and managerial performance*** 4.4. Develop and implement plans in accordance with ***enterprise goals and objectives*** 4.5. Develop, set and monitor key performance indicators and targets within the team/enterprise business plans

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- coaching and mentoring skills to encourage and develop team members effectively
- communication skills to conduct effective informal and formal meetings, to communicate effectively with personnel at all levels, and to provide effective feedback
- effective goal setting skills to be able to set realistic but challenging goals for team

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REQUIRED SKILLS AND KNOWLEDGE
members • interpersonal skills to establish rapport and to build relationships with clients, team members and stakeholders • leadership skills to gain the trust and confidence of colleagues and clients • literacy skills to communicate and articulate information and ideas clearly and effectively • organisational skills to lead the team in a methodical and organised manner and in line with to agreed timeframes • problem-solving skills to resolve problems in a systematic and positive manner and to create innovative and effective solutions • team building skills to effectively develop team spirit and morale.
Required knowledge
• coaching and mentoring techniques • continuous improvement techniques and processes • enterprise culture and values • enterprise mission, business goals and standards • enterprise policies, procedures and guidelines • operational environment - customer base, company products and services • performance management policies, procedures and systems.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • acquiring and using information to the best advantage for achievement of team/project performance goals • making decisions appropriate to the achievement of team performance goals • effectively managing work to achieve goals and results • introducing and monitoring practices to improve performance • undertaking effective consultation processes

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EVIDENCE GUIDE	
	• effectively using management information systems in the achievement of team performance goals and objectives • clearly and effectively communicating critical information to team, peers and management • promoting available learning methods to support team competence • knowledge of the organisational goals, values and objectives.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace information and data • access to relevant legislation, standards and guidelines • access to 360 degree feedback • access to documentation relating to continuous improvement initiatives, development plans and training plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • direct observation of leadership style and effectiveness in the work environment • review of 360 degree feedback • review of performance management, development planning, training and team meeting minute documentation • oral and/or written questioning to assess knowledge of organisational goals, values and objectives • review of leader's self-assessment of leadership effectiveness and self-awareness.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other management units

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Enterprise standards and values may include:	• code of conduct (behaviours) • compliance with regulatory and legislative requirements • customer service charter • enterprise quality and continuous improvement processes and standards • ethical standards established by the enterprise • policies and procedures • values of the organisation • vision and mission statement
Personal presentation may include:	• body language • conduct • dress standards • language • punctuality
Personal and managerial performance may include:	• way the candidate manages the performance and behaviours of team members and teams • way the candidate self manages own performance and behaviours
Enterprise goals and objectives may include:	• company business objectives • company standards and values • productivity and profitability objectives and targets

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBMGT406A Plan and monitor continuous improvement

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan and monitor the organisation's continuous improvement systems and processes. Particular emphasis is on using systems and strategies to actively encourage the team to participate in the process, monitoring and reviewing performance, and identifying opportunities for further improvements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to frontline managers who have an active role in planning and monitoring a continuous improvement process to achieve an organisation's objectives. Their position, closely associated with the creation and delivery of products and services, means that they have an important role in influencing the ongoing development of the organisation. At this level, work will normally be carried out using routine and non-routine methods and procedures, which require planning and evaluation, and leadership and guidance of others.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan continuous improvement systems and processes	1.1. Plan ***systems*** according to organisational policy to ensure that individuals and teams are actively encouraged and supported to ***participate in decision-making processes***, assume responsibility and exercise initiative 1.2. Communicate the organisation's ***continuous improvement processes*** to individuals and teams, and obtain feedback 1.3. Ensure effective ***mentoring and coaching*** allow individuals and teams to implement the organisation's continuous improvement processes 1.4. Support efforts to enhance ***sustainable and environmentally friendly work practices*** in accordance with the organisation's continuous

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ELEMENT	PERFORMANCE CRITERIA
	improvement processes
2. Monitor and review performance	2.1. Use the organisation's systems and ***technology*** according to agreed operational processes to monitor and review progress and to identify ways in which planning and operations could be improved 2.2. Improve ***customer service*** through continuous improvement techniques and processes according to the requirements of the organisation's continuous improvement systems and processes 2.3. Formulate and communicate recommendations for adjustments to those who have a role in their development and implementation
3. Provide opportunities for further improvement	3.1. Implement ***processes*** to ensure that team members are informed of savings and productivity or service improvements in line with the requirements of the business plan 3.2. Record work performance to assist in identifying further opportunities for improvement following agreed organisational record keeping processes 3.3. Manage records, reports and recommendations for improvement within the organisation's systems and processes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to gain the commitment of individuals and teams to continuously improve • innovation skills to design better ways of performing work • learning skills to coach and mentor team members, using a range of methods to cater for different learning styles • problem-solving skills to develop practical and innovative solutions • teamwork skills to implement continuous improvement within a team
Required knowledge
• principles and techniques associated with:

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REQUIRED SKILLS AND KNOWLEDGE
• benchmarking • best practice • change management • continuous improvement systems and processes • quality systems

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • taking active steps to implement, monitor and adjust plans, processes and procedures to improve performance • supporting others to implement the continuous improvement system and processes, and to identify and report opportunities for further improvement.
Context of and specific resources for assessment	Assessment must ensure access to appropriate documentation and resources normally used in the workplace.
Method of assessment	The following assessment methods are appropriate for this unit: • assessment of reports • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge of principles and techniques associated with change management • review of how the organisation's continuous improvement processes were communicated to individuals and teams • review of documentation of work performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Systems may refer to:	• forums and meetings • newsletters and reports • organisational policies and procedures • electronic communication devices.
Participation in decision-making processes may include:	• feedback in relation to outcomes of the consultative process • processes that ensure employees have the opportunity to contribute to organisational issues.
Continuous improvement processes may include:	• cyclical audits and reviews of workplace, team and individual performance • evaluations and monitoring of effectiveness • implementation of quality systems, such as International Organization for Standardization (ISO) • modifications and improvements to systems, processes, services and products • policies and procedures that allow the organisation to systematically review and improve the quality of its products, services and procedures • seeking and considering feedback from a range of stakeholders.
Mentoring and coaching may refer to:	• providing assistance with problem solving • providing feedback, support and encouragement • teaching another member of the team, usually focusing on a specific work task or skill.
Sustainable and environmentally friendly work practices may refer to:	• addressing environmental and resource sustainability initiatives, such as environmental management systems, action plans, green office programs, surveys and audits • applying the waste management hierarchy in the workplace • complying with regulations and corporate social responsibility considerations for sustainability to enhance the organisation's standing in business and community environments • determining organisation's most appropriate waste

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RANGE STATEMENT	
	treatment, including waste to landfill, recycling, re-use, recoverable resources and wastewater treatment • implementing ecological footprinting • implementing environmental management systems, e.g. ISO 14001:1996 Environmental management systems life cycle analyses • implementing government initiatives, e.g. Australian government's Greenhouse Challenge Plus • improving resource and energy efficiency • initiating and maintaining appropriate organisational procedures for operational energy consumption • introducing a green office program (a cultural change program) • introducing green purchasing • introducing national and international reporting initiatives, e.g.Â Global Reporting Initiative • introducing product stewardship • reducing emissions of greenhouse gases • reducing use of non-renewable resources • referencing standards, guidelines and approaches, such as sustainability covenants and compacts or triple bottom line reporting • supporting sustainable supply chain.
Technology may include:	• computerised systems and software, such as databases, project management and word processing • telecommunications devices • any other technology used to carry out work roles and responsibilities.
Customer service may be:	• internal or external • to existing, new or potential clients.
Processes may refer to:	• email, intranet, or other digital communication devices • newsletters and bulletins • staff reward mechanisms • team meetings.

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and leadership - management

Co-requisite units

Co-requisite units		

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BSBMGT502B Manage people performance

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage the performance of staff who report to them directly. Development of key result areas and key performance indicators and standards, coupled with regular and timely coaching and feedback, provide the basis for performance management. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to all managers and team leaders who manage people. It covers work allocation and the methods to review performance, reward excellence and provide feedback where there is a need for improvement. The unit makes the link between performance management and performance development, and reinforces both functions as a key requirement for effective managers. This is a unit that all managers/prospective managers who have responsibility for other employees should strongly consider undertaking.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Allocate work	1.1. Consult relevant groups and individuals on work to be allocated and resources available 1.2. Develop work plans in accordance with operational plans 1.3. Allocate work in a way that is efficient, cost effective and outcome focussed 1.4. Confirm ***performance standards***, ***Code of Conduct*** and work outputs with relevant teams and individuals 1.5. Develop and agree ***performance indicators*** with relevant staff prior to commencement of work 1.6. Conduct ***risk analysis*** in accordance with the organisational risk management plan and legal requirements
2. Assess performance	2.1. Design ***performance management*** and review processes to ensure consistency with organisational

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ELEMENT	PERFORMANCE CRITERIA
	objectives and policies 2.2. Train participants in the performance management and review process 2.3. Conduct performance management in accordance with organisational protocols and time lines 2.4. Monitor and evaluate performance on a continuous basis
3. Provide feedback	3.1. Provide informal feedback to staff on a regular basis 3.2. Advise relevant people where there is poor performance and take necessary actions 3.3. Provide on-the-job coaching when necessary to improve performance and to confirm ***excellence in performance*** 3.4. Document performance in accordance with the organisational performance management system 3.5. Conduct formal structured feedback sessions as necessary and in accordance with organisational policy
4. Manage follow up	4.1. Write and agree performance improvement and development plans in accordance with organisational policies 4.2. Seek assistance from human resources specialists where appropriate 4.3. Reinforce excellence in performance through recognition and continuous feedback 4.4. Monitor and coach individuals with poor performance 4.5. Provide support services where necessary 4.6. Counsel individuals who continue to perform below expectations and implement the disciplinary process if necessary 4.7. ***Terminate*** staff in accordance with legal and organisational requirements where serious misconduct occurs or ongoing poor-performance continues

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to articulate expected standards of performance, to provide effective feedback and to coach staff who need development • risk management skills to analyse, identify and develop mitigation strategies for identified risks • planning and organisation skills to ensure a planned and objective approach to the performance management system.
Required knowledge
• relevant legislation from all levels of government that affects business operation, especially in regard to occupational health and safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • relevant awards and certified agreements • performance measurement systems utilised within the organisation • unlawful dismissal rules and due process • staff development options and information.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documented performance indicators and a critical description and analysis of performance management system from the workplace • techniques in providing feedback and coaching for improvement in performance • knowledge of relevant awards and certified agreements.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports • demonstration of techniques in providing feedback and coaching • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of work plans, performance indicators, risk analysis,performance management and review processes, performance improvement and development plans.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Performance standards mean:	• level of performance sought from an individual or group which may be expressed either quantitatively or qualitatively
Code of Conduct means:	• agreed (or decreed) set of rules relating to employee behaviour/conduct with other employees or an agreed (or decreed) set of rules relating to employee behaviour/conduct with other employees or customers
Performance indicators mean:	• measures against which performance outcomes are gauged

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RANGE STATEMENT	
Risk analysis means:	• determination of the likelihood of a negative event preventing the organisation meeting its objectives and the likely consequences of such an event on organisational performance
Performance management means:	• in accordance with relevant industrial agreements • process or set of processes for establishing a shared understanding of what an individual or group is to achieve, and managing and developing individuals in a way which increases the probability it will be achieved in both the short- and long-term
Excellence in performance means:	• regularly and consistently exceeding the performance targets established while meeting the organisation's performance standards
Termination means:	• cessation of the contract of employment between an employer and an employee, at the initiative of the employer within relevant industrial agreements

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBMGT515A Manage operational plan

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and monitor implementation of the operational plan to provide efficient and effective workplace practices within the organisation's productivity and profitability plans. Management at a strategic level requires systems and procedures to be developed and implemented to facilitate the organisation's operational plan. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to people who manage the work of others and operate within the parameters of a broader strategic and/or business plan. The task of the manager at this level is to develop and implement an operational plan to ensure that the objectives and strategies outlined in the strategic and/or business plan are met by work teams. However in some larger organisations operational plans may be developed by a strategic planning unit. At this level work will normally be carried out within complex and diverse methods and procedures, which require the exercise of considerable discretion and judgement, using a range of problem solving and decision making strategies.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop operational plan	1.1. Research, analyse and document ***resource requirements*** and develop an operational plan in consultation with ***relevant personnel***, ***colleagues and specialist resource managers*** 1.2. Develop and/or implement ***consultation processes*** as an integral part of the operational planning process 1.3. Ensure details of the operational plan include the development of ***key performance indicators*** to measure organisational performance 1.4. Develop and implement ***contingency plans*** at appropriate stages of operational planning 1.5. Ensure the development and presentation of proposals for resource requirements is supported by a variety of information sources and seek specialist

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ELEMENT	PERFORMANCE CRITERIA
	advice as required 1.6. Obtain approval for plan from relevant parties and ensure understanding among work teams involved
2. Plan and manage resource acquisition	2.1. Develop and implement strategies to ensure that employees are recruited and/or inducted within the organisation's human resources management policies and practices 2.2. Develop and implement strategies to ensure that physical resources and services are acquired in accordance with the ***organisation's policies***, ***practices and procedures***
3. Monitor and review operational performance	3.1. Develop, monitor and review performance systems and processes to assess progress in achieving profit and productivity plans and targets 3.2. Analyse and interpret budget and actual financial information to monitor and review profit and productivity performance 3.3. Identify areas of under performance, recommend solutions, and take prompt action to rectify the situation 3.4. Plan and implement systems to ensure that mentoring and coaching are provided to support individuals and teams to effectively, economically and safely use resources 3.5. Negotiate recommendations for variations to operational plans and gain approval from ***designated persons***/***groups*** 3.6. Develop and implement systems to ensure that procedures and records associated with documenting performance are managed in accordance with organisational requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to access and use workplace information and to write a succinct and

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REQUIRED SKILLS AND KNOWLEDGE
practical plan • technology skills to use software to produce and monitor the plan against performance indicators • planning and organisational skills • coaching skills to work with people with poor performance • numeracy skills to allocate and manage financial resources.
Required knowledge
• models and methods for operational plans • budgeting processes • alternative approaches to improving resource usage and eliminating resource inefficiencies and waste.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of an operational plan with details of how it will be implemented and monitored • knowledge of models and methods for operational plans.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of budgeting processes • review of operational plan, key performance

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EVIDENCE GUIDE	
	indicators and contingency plans • evaluation of employee recruitment and induction strategies • evaluation of processes implemented to acquire physical resources and services.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Resource requirements may include:	• goods and services to be purchased and ordered • human, physical and financial resources - both current and projected • stock requirements and requisitions
Relevant personnel, colleagues and specialist resource managers may include:	• employees at the same level or more senior managers • managers • occupational health and safety committee/s and other people with specialist responsibilities • supervisors • union or employee representatives
Consultation processes may refer to:	• email/intranet communications, newsletters or other processes and devices which ensure that all employees have the opportunity to contribute to team and individual operational plans • mechanisms used to provide feedback to the work team in relation to outcomes of

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RANGE STATEMENT	
	consultation • meetings, interviews, brainstorming sessions
Operational plans may also be termed:	• action plans • annual plans • management plans • tactical plans
Key performance indicators may refer to:	• measures for monitoring or evaluating the efficiency or effectiveness of a system which may be used to demonstrate accountability and to identify areas for improvements
Contingency plans may include:	• contracting out or outsourcing human resources and other functions or tasks • diversification of outcomes • finding cheaper or lower quality raw materials and consumables • increasing sales or production • recycling and re-using • rental, hire purchase or alternative means of procurement of required materials, equipment and stock • restructuring of organisation to reduce labour costs • risk identification, assessment and management processes • seeking further funding • strategies for reducing costs, wastage, stock or consumables • succession planning
Organisation's policies, ***practices and procedures*** may include:	• organisational culture • organisational guidelines which govern and prescribe operational functions, such as the acquisition and management of human and physical resources • Standard Operating Procedures • undocumented practices in line with organisational operations
Designated persons/***groups*** may include:	• groups designated in workplace policies and procedures • managers or supervisors whose roles and responsibilities include decision making on operations • other stakeholders such as Board members

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RANGE STATEMENT	
	• other work groups or teams whose work will be affected by recommendations for variations

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBMGT516C Facilitate continuous improvement

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to lead and manage continuous improvement systems and processes. Particular emphasis is on the development of systems and the analysis of information to monitor and adjust performance strategies, and to manage opportunities for further improvements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to managers who take an active role in managing a continuous improvement process in order to achieve an organisation's objectives. Where managers are closely associated with the creation and delivery of products and services, they play an important part in influencing the ongoing development of the organisation. At this level, work will normally be carried out using complex and diverse methods and procedures which require the exercise of considerable discretion and judgement, using a range of problem-solving and decision-making strategies.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Lead continuous improvement systems and processes	1.1. Develop ***strategies*** to ensure that team members are actively encouraged and supported to participate in decision-making processes, assume responsibility and exercise initiative as appropriate 1.2. Establish ***systems*** to ensure that the organisation's ***continuous improvement processes*** are communicated to ***stakeholders*** 1.3. Ensure that change and improvement processes meet ***sustainability requirements*** 1.4. Develop effective mentoring and coaching processes to ensure that individuals and teams are able to implement and support the organisation's continuous improvement processes 1.5. Ensure that insights and experiences from business

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ELEMENT	PERFORMANCE CRITERIA
	activities are captured and accessible through ***knowledge management systems***
2. Monitor and adjust performance strategies	2.1. Develop strategies to ensure that systems and processes are used to monitor ***operational progress*** and to identify ways in which planning and operations could be improved 2.2. Adjust and communicate strategies to stakeholders according to organisational procedures
3. Manage opportunities for further improvement	3.1. Establish processes to ensure that team members are informed of outcomes of continuous improvement efforts 3.2. Ensure processes include ***recording of work team performance*** to assist in identifying further opportunities for improvement 3.3. Consider areas identified for further improvement when undertaking future planning

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills tocommunicate opportunities for improvement • learning skills to coach and mentor staff, using a range of methods to cater for different learning styles • innovation and lateral thinking skills to design better ways for achieving work outcomes • planning skills to establish and monitor systems and process for continuous improvement • teamwork and leadership skills to gain the confidence and trust of others
Required knowledge
• continuous improvement models • knowledge management systems • quality systems • sustainability principles

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development and use of a range of strategies and approaches that improve work outcomes or organisational functioning, using continuous improvement models • monitoring performance and customer service.
Context of and specific resources for assessment	Assessment must ensure access to appropriate documentation and resources normally used in the workplace.
Method of assessment	The following assessment methods are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of reports • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observationof presentations • oral or written questioning to assess knowledge of quality systems • review of strategies developed to ensure that team members are actively encouraged and supported to participate in decision-making processes, assume responsibility and exercise initiative • evaluation of how customer-service strategies were communicated to stakeholders • review of documentation outlining work team performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different

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RANGE STATEMENT	
work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Strategies may refer to:	• clarification of roles and expectations • communication devices and processes, such as intranet and email communication systems, to facilitate input into workplace decisions • long-term or short-term plans that factor in opportunities for team input • mentoring and 'buddy' systems to support team members to participate in decision making • performance plans • reward and recognition programs for high performing staff • training and development activities.
Systems may refer to:	• forums and meetings • newsletters and reports • policies and procedures • electronic communication devices.
Continuous improvement processes may include:	• cyclical audits and reviews of workplace, team and individual performance • evaluations and monitoring of effectiveness • modifications and improvements to systems, processes, services and products • policies and procedures that allow an organisation to systematically review and improve the quality of its products, services and procedures • seeking and considering feedback from a range of stakeholders.
Stakeholders may include:	• business or government contacts • funding bodies • individuals within the work team • internal and external contacts • organisation's clients and customers • professional associations • senior management and board members • unions and employee groups.
Sustainability requirements may	• addressing environmental and resource sustainability initiatives, such as environmental management systems,

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RANGE STATEMENT	
include:	action plans, green office programs, surveys and audits • applying the waste management hierarchy in the workplace • complying with regulations and corporate social responsibility considerations for sustainability to enhance the organisation's standing in business and community environments • determining organisation's most appropriate waste treatment, including waste to landfill, recycling, re-use, recoverable resources and wastewater treatment • implementing ecological footprinting • implementing environmental management systems, e.g. ISO 14001:1996 Environmental management systems life cycle analyses • implementing government initiatives, e.g. Australian government's Greenhouse Challenge Plus • improving resource and energy efficiency • initiating and maintaining appropriate organisational procedures for operational energy consumption • introducing a green office program (a cultural change program) • introducing green purchasing • introducing national and international reporting initiatives, e.g. Global Reporting Initiative • introducing product stewardship • reducing emissions of greenhouse gases • reducing use of non-renewable resources • referencing standards, guidelines and approaches, such as sustainability covenants and compacts or triple bottom line reporting • supporting sustainable supply chain.
Knowledge management systems may include:	• best practice transfer • communities of practice • cross-project learning • expert directories • knowledge brokers' knowledge mapping • knowledge repositories • measuring and reporting intellectual capital • mentoring • performance management • post-project reviews • proximity and architecture

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RANGE STATEMENT	
	• social software • storytelling.
Operational progress may refer to:	• customer service indicators • OHS indicators • productivity gains • success in meeting agreed goals and performance indicators.
Recording of work team performance may include:	• annotated performance plans • quantitative data, such as production figures • recommendations for improvement • records and reports.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and leadership - management

Co-requisite units

Co-requisite units		

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BSBMGT605B Provide leadership across the organisation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to demonstrate senior leadership behaviour, and personal and professional competence. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to senior managers who have a role in inspiring and motivating others to achieve organisational goals and to model professionalism in their organisation and industry. Leadership is seen in the context of the organisational mission. Business ethics are also addressed in this unit. The unit may relate equally to leadership of a small to medium sized organisation or to a business unit or area in a large organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Communicate organisational mission and goals	1.1. Clarify objectives, values and standards in accordance with organisation's strategic direction 1.2. Establish linkages between organisational objectives, values and standards and the responsibilities of relevant groups and individuals 1.3. Ensure media and language used is appropriate to individuals and group circumstances 1.4. State clear expectations of internal groups and individuals and explain in a manner which builds commitment to the organisation 1.5. Address ***expectations of the organisation*** 1.6. Investigate ***incidents*** promptly and communicate results clearly to relevant groups and individuals
2. Influence groups and individuals	2.1. Build trust, confidence and respect of diverse groups and individuals, through positive role modelling, and effective communication and consultation 2.2. Embrace, resource and effectively implement improvements to organisational and workplace culture 2.3. Demonstrate understanding of the global environment and new technology in work activities 2.4. Ensure actions convey flexibility and adaptability to

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ELEMENT	PERFORMANCE CRITERIA
	change and accessibility 2.5. Ensure consultation and participation in decision making occurs with relevant groups and individuals where appropriate 2.6. Ensure decision making takes into account needs and expectations of both internal and external groups 2.7. Ensure decision making occurs in accordance with ***risk management*** plans for all options, and within appropriate timeframes 2.8. Ensure that the organisation is represented positively in the media and community
3. Build and support teams	3.1. Assign ***accountabilities and responsibilities*** to teams consistent with their competencies and operational plans 3.2. Ensure teams are resourced to allow them to achieve their objectives 3.3. Empower teams and individuals through effective delegation and support for their initiatives 3.4. Create and maintain ***a positive work environment*** 3.5. Encourage teams and individuals to develop innovative approaches to the performance of work
4. Demonstrate personal and professional competence	4.1. Model ethical conduct in all areas of work and encourage others to adopt business ethics 4.2. Adapt appropriate interpersonal and leadership styles to meet particular circumstances and situations 4.3. Set and achieve personal objectives and work program outcomes 4.4. Ensure self performance and professional competence is continuously improved through engagement in a range of professional development activities 4.5. Participate regularly in industry/professional networks and groups

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• interpersonal skills to communicate and inspire trust and confidence of others and to ensure their cooperation and support • networking skills to ensure support from key groups and individuals for concepts/ideas/products/services • risk management skills to analyse, identify and develop mitigation strategies for identified risks.
Required knowledge
• business ethics and their application • leadership styles and their application • legislation, codes and by-laws relevant to the organisation's operations • organisation mission, purpose and values • organisation objectives, plans and strategies • organisational change processes.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • input from a wide range of sources providing evidence in respect to a broad range of activities and application of business ethics • demonstration of personal competence that links to the organisation's requirements for managers • effective communication skills and an ability to win commitment to the organisation and its activities • knowledge of leadership styles and their application • knowledge of legislation, codes and by-laws relevant to the organisation's operations.
Context of and specific resources for	Assessment must ensure:

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EVIDENCE GUIDE	
assessment	• access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated leadership techniques • observation of presentations • review of media and language used when communicating with individuals and groups • evaluation of accountabilities and responsibilitiesassigned to teams • review of documentation outlining personal objectives and work program outcomes • review of professional development activities undertaken to improve self performance and professional competence.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Advanced Diploma of Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Expectations of the organisation include:	• environmental management • occupational health and safety • product safety

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RANGE STATEMENT	
	• service • values and ethics • other relevant factors
Incidents may include:	• emergency response • environmental event (emissions, noise, etc.) • product failure • workplace accident
Risk management means:	• process of identification of potential negative events and the development of plans to mitigate or minimise the likelihood of the negative event occurring and/or the consequences in the event it does occur
Accountabilities and responsibilities means:	• clarification of who is to be accountable for a decision or action prior to its execution, and identification of groups, individuals and activities for which a person is responsible for managing
Positive work environment means:	• environment where employees identify with the organisation and its purpose and where communication is free-flowing, decisions are transparent and conflict is positive and constructive

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBMGT608C Manage innovation and continuous improvement

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to sustain and develop an environment in which continuous improvement, innovation and learning are promoted and rewarded. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to people with managerial responsibilities, including for building a better and more effective work environment. Continuous improvement and innovation have links with the model of the learning organisation and people working at this level play an important role in building the culture, values and attitudes of the organisation. Links may be made between continuous improvement and formal quality systems, such as International Organization for Standardization (ISO) or quality software. However it is not assumed that formal quality systems or software are in the workplace. Innovation is seen as an important attitude and set of practices, which should be fostered by people working at this level in teams and across the organisation.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Review programs, systems and processes	1.1. Establish strategies to monitor and evaluate performance and ***sustainability*** of key systems and processes 1.2. Undertake detailed analyses of ***supply chains***, and operational, product and service delivery systems 1.3. Identify performance measures, and assessment tools and techniques, and evaluate their effectiveness 1.4. Analyse ***performance reports*** and variance from plans for key result areas of the organisation 1.5. Identify and analyse changing trends and opportunities relevant to the organisation 1.6. Seek advice from specialists, where appropriate, to identify technology and electronic commerce opportunities

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ELEMENT	PERFORMANCE CRITERIA
2. Develop options for continuous improvement	2.1. Brief groups on performance improvement strategies and innovation as an essential element of competition 2.2. Foster creative climate and organisational learning by promoting interaction within and between work groups 2.3. Encourage, test and recognise new ideas and entrepreneurial behaviour where successful 2.4. Accept failure of an idea during trialling, and recognise, celebrate and embed success into systems 2.5. Undertake risk management and cost-benefit analysis for each option or idea approved for trial 2.6. Approve innovations through agreed organisational processes
3. Implement innovative processes	3.1. Promote continuous improvement and sustainability as essential to doing business 3.2. Address impact of change and consequences for people, and implement transition plans 3.3. Ensure objectives, timeframes, measures and communication plans are in place to manage implementation 3.4. Implement contingency plans in the event of non-performance 3.5. Follow up failure by prompt investigation and analysis of causes and manage emerging challenges and opportunities effectively 3.6. Ensure that learnings from activities are captured and managed to inform future work 3.7. Regularly evaluate continuous improvement systems and processes 3.8. Communicate costs and benefits of innovations and improvements to relevant groups and individuals

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

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REQUIRED SKILLS AND KNOWLEDGE

• analytical skills to identify improvement opportunities in relation to:
  • concepts and ideas developed
  • services or products delivered
• flexibility and creativity skills to think laterally
• learning skills to develop options for continuous improvement
• teamwork and leadership skills to foster a commitment to quality and an openness to innovation

Required knowledge
• cost-benefit analysis methods • creativity and innovation theories and concepts • organisational learning principles • quality management and continuous improvement theories • risk management • sustainability practices

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of consultation processes to introduce or evaluate an existing continuous improvement process or system, including suggested actions or an action plan • generation of an idea or concept that exhibits creative thinking and offers the possibility of benefiting the organisation • demonstration of how the concept or idea was introduced, tested and evaluated,which does not have to have been shown to work or to be adopted by the business • application of knowledge of quality management and continuous improvement theories.
Context of and specific resources for assessment	Assessment must ensure access to appropriate documentation and resources normally used in the workplace.

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EVIDENCE GUIDE	
Method of assessment	The following assessment methods are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of reports • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge of creativity and innovation theories and concepts • evaluation of strategies established to monitor and evaluate performance of key systems and processes • review of briefing of groups on performance improvement strategies and innovation • review of documentation communicating costs and benefits of innovations and improvements to relevant groups and individuals.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Sustainability may include:	• addressing environmental and resource sustainability initiatives, such as environmental management systems, action plans, green office programs, surveys and audits • applying the waste management hierarchy in the workplace • complying with regulations and corporate social responsibility considerations for sustainability to enhance the organisation's standing in business and community environments • determining organisation's most appropriate waste treatment, including waste to landfill, recycling, re-use,

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RANGE STATEMENT	
	recoverable resources and wastewater treatment • implementing ecological footprint • implementing environmental management systems, e.g. ISO 14001:1996 Environmental management systems life cycle analyses • implementing government initiatives, e.g. Australian government's Greenhouse Challenge Plus • improving resource and energy efficiency • initiating and maintaining appropriate organisational procedures for operational energy consumption • introducing a green office program - a cultural change program • introducing green purchasing • introducing national and international reporting initiatives, e.g. Global Reporting Initiative • introducing product stewardship • reducing emissions of greenhouse gases • reducing use of non-renewable resources • referencing standards, guidelines and approaches, such as sustainability covenants and compacts or triple bottom line reporting • supporting sustainable supply chain.
Supply chains include:	• network of facilities that procures raw materials, transforms them into intermediate products or services and then finished goods or service, and delivers them through a distribution system • procurement, production and distribution, viewed as interlinked not as discrete elements.
Performance reports may include:	• budget or cost variance • customer service • environmental • financial • OHS • quality • other operating parameters.

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and leadership - management

Co-requisite units

Co-requisite units		

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BSBMGT615A Contribute to organisation development

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to contribute to the creation of an organisation development plan which ensures that the organisation will become more effective over time in achieving its goals. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to senior managers with organisation wide responsibilities who are critically involved in shaping and focussing the organisation so that it can adapt to new technologies, challenges and markets. People who have this responsibility may be in a dedicated organisation design role or may be change managers, or human resources managers. They may also be employed as consultants or contractors.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop organisation development plan	1.1. Analyse strategic plans to determine organisation development needs and objectives 1.2. Consult with ***relevant groups and individuals*** to profile the organisation's culture and readiness for organisational development 1.3. Determine who will take key roles in the organisational development process and confirm their commitment 1.4. Collect and analyse data on areas of the business experiencing problems or that need realignment 1.5. Determine and agree on objectives and strategies for organisational development 1.6. Consider ***change management techniques*** required to achieve the workplace culture outcomes and build them into the organisation development plan 1.7. Develop ***communication***/***education plans*** to achieve communication objectives in relation to the desired

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ELEMENT	PERFORMANCE CRITERIA
	work environment and desired approach to problem-solving and developmental activities
2. Implement organisation development activities	2.1. Identify and implement consultative processes to maximise participation in the organisation development process 2.2. Undertake ***team development and training activities*** to develop collaborative approaches to problem-solving and development 2.3. Facilitate groups to articulate problems and to propose means for resolving the problems 2.4. Manage conflict between individuals and/or groups to achieve consensus or agreement 2.5. Undertake interventions in accordance with the organisation development plan 2.6. Brainstorm alternative proposals, and negotiate and agree on outcomes
3. Maintain organisation development program	3.1. Undertake surveys to identify any loss of support for organisation development program and activities 3.2. Maintain regular team meetings and individual feedback in accordance with communication plan 3.3. Set out ***activities and interventions*** in the organisation development plan and maintain, evaluate and modify them as required 3.4. Ensure senior management reinforces organisation development program by ongoing messages of support and appropriate resource allocation 3.5. Evaluate organisation development plans in terms of costs and benefits, including opportunity costs

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• leadership skills to gain commitment and followership • communication and interpersonal skills to persuade others • lateral thinking skills to find new, improved or different ways of working or engineering the organisation.

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge
• planning processes • concepts and theory of organisation behaviour; organisation dynamics; organisation culture; organisation change.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • detailed organisation development plan which clearly addresses what is to be developed and why, and how development will occur • analysis of an organisation development process • knowledge of concepts and theory of organisation behaviour; organisation dynamics; organisation culture; organisation change.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to organisation development processes or organisational case studies • assessment of written reports on organisation development • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in engaging others in change processes • review of analysis of data on areas of the business

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EVIDENCE GUIDE	
	experiencing problems or that need realignment • review of documentation outlining interventions undertaken • review of organisation development consultative processes implemented • evaluation of documentation outlining alternative proposals brainstormed, and negotiation and agreement on outcomes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Advanced Diploma of Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant groups and individuals refers to:	• personnel who have knowledge about the issue being dealt with and the expertise to assist the decision-making process
Change management techniques may include:	• business re-engineering • consultative processes • job redesign • organisational redesign • sensitivity training • systems redesign • work re-organisation
Communication/education plans refers to:	• documented range of activities designed to ensure all affected groups and individuals (and other relevant parties) obtain sufficient knowledge to allow them to understand what is happening and why, and to allow them to participate where appropriate

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RANGE STATEMENT	
Team development and training activities may include:	• computer-based training • group work • one-on-one sessions • informal coaching • mentoring • sensitivity training
Activities and interventions may include:	• action research • brainstorming • career planning • inter-group team building • job redesign • quality circles • re-engineering • sensitivity training • succession planning • surveys (with feedback) • team building • training • transition analysis

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBMGT616A Develop and implement strategic plans

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish the strategic direction of the organisation, and to sustain competitive advantage and enhance competitiveness. It requires analysis and interpretation of relevant markets, capability assessment of the organisation, and its existing and potential competitors and allies. It also covers implementation of the strategic plan. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in senior roles in the organisation, who have responsibility for ensuring that the organisation is positioned to ensure its long term viability and success. The unit covers the requirements for analysing the organisation's present position, and for developing specific actions and initiatives that will be undertaken by people working in various roles.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Confirm organisational vision and mission	1.1. Check with ***stakeholders*** that organisational vision and mission are still held to be current and are supported 1.2. Make any changes or refinements to vision or mission statement as required 1.3. Review or develop organisational values to support the vision and mission statement 1.4. Gain support for strategic planning process from all relevant stakeholders
2. Analyse the internal and external environment	2.1. Determine information requirements and undertake or commission ***research*** to deliver relevant information 2.2. Analyse political, economic, social, and technological developments in a ***global context*** 2.3. Seek advice from appropriate experts wherever necessary 2.4. Identify and consider strengths and weaknesses of

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ELEMENT	PERFORMANCE CRITERIA
	existing and potential competitors and allies 2.5. Analyse organisation's strengths, weaknesses, opportunities and threats 2.6. Consider co-operative ventures that are supported by risk and cost-benefit analyses, are consistent with the organisational vision, mission and values, and provide for ***due diligence*** 2.7. Check that analysis of internal and external environment is consistent with the perspectives of other informed people
3. Write strategic plan	3.1. Document relevant research and background for inclusion in the strategic plan 3.2. Formulate strategic objectives and strategies needed for the future 3.3. Detail each strategy with an assigned priority, a timeframe, responsible parties and measurable performance indicators 3.4. Circulate strategic plan for comment, support and endorsement
4. Implement strategic plan	4.1. Communicate strategic plan to all relevant parties 4.2. Brief people with a specific role in relation to strategies 4.3. Use performance indicators to monitor progress in implementing plan 4.4. Make necessary refinements to plan 4.5. Evaluate achievement of objectives at agreed milestones 4.6. Review effectiveness of plan and consider methods for improving strategic planning processes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to undertake value chain analysis, to review strengths and weaknesses, and to collate and interpret statistical data including trend analysis

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REQUIRED SKILLS AND KNOWLEDGE
• financial skills to consider resource implications of proposed strategies • research skills to ensure accurate, up-to-date information is available for the environmental analysis • risk management skills to plan and undertake appropriate due diligence.
Required knowledge
• relevant legislation from all levels of government that affects business operation, especially in regard to occupational health and safety and environmental issues, equal opportunity, industrial relations and anti-discrimination • strategic planning methodologies including political, economic, social and technological (PEST) analysis and strengths, weaknesses, opportunities and threats analysis (SWOT) • competitor knowledge • codes and by-laws relevant to the organisation's operations.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • thorough analysis of the organisation's own capabilities, those of their existing potential competitors and allies, and the external environment • strategic plan which includes objectives, strategies, timeframes, performance indicators and methods for monitoring the implementation of the plan • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of

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EVIDENCE GUIDE	
	portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge of strategic planning methodologies • review of documentation outlining strengths and weaknesses of existing and potential competitors and allies • review of strategies and their assigned priority, timeframe, responsible parties and performance indicators.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Advanced Diploma of Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Stakeholders may include:	• Board • customers • employees • government agencies • owners • shareholders • technical advisers
Research may include:	• commissioned research • demographics • economics • internal research • market segmentation

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RANGE STATEMENT	
	• political • product • social • technological
Global context means:	• examination on a world-wide basis of factors which may impact on the long-term strategic direction of the business
Due diligence means:	• process by which an investor, lawyer, auditor, or other qualified person, verifies the accuracy of data provided by another organisation

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBMGT617A Develop and implement a business plan

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to run a business operation and covers the steps required to develop and implement a business plan. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are running an organisation or who take a senior role in determining the effective functioning and success of the organisation. As such, they may oversee the work of a number of teams and other managers. Business plans are critical tools for business growth and development. They will vary depending on the needs of the organisation. This unit covers the typical elements of a business plan and the standard approaches to be used in implementing a business plan. The business plan should be supported by a strategic plan, and may also be supported by a marketing plan and cash flow forecasts.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop business plan	1.1. Review and evaluate pre-existing ***strategic***, ***business and operational plan***, if available 1.2. Analyse and interpret business vision, mission, values and objectives 1.3. Consult with ***key stakeholders*** 1.4. Review market requirements for the product or service, profile customer needs and research pricing options 1.5. Develop ***performance objectives and measures*** through consultation with key stakeholders 1.6. Identify financial, human and physical resource requirements for the business 1.7. Consider any permits or licences that may be required for new activity 1.8. Write ***business plan***

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ELEMENT	PERFORMANCE CRITERIA
2. Monitor performance	2.1. Communicate business plan to all relevant parties and ensure understanding of performance requirements and timeframes 2.2. Ensure skilled labour is available to implement plan 2.3. Test performance measurement systems and refine, if necessary 2.4. Ensure timely reports on all key aspects of the business are available, user-friendly and balanced in terms of financial and non-financial performance 2.5. Report system failures, product failures and variances to the business plan as they occur
3. Respond to performance data	3.1. Analyse performance reports against planned objectives 3.2. Review performance indicators and refine if necessary 3.3. Ensure groups and individuals contributing to under-performance are ***coached***, and provide training where appropriate 3.4. Review system processes and work methods regularly as part of continuous improvement

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical and research skills to review the market, to research competitors and to review pricing structures • coaching and communication skills to remediate any under-performance in the work group or individuals • planning and organising skills to sequence activities and to develop a logical structure.
Required knowledge
• performance measurement approaches and benchmarking • options for developing business plans.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • analysis of the strengths and weaknesses of a range of business plans • implementation of a business plan including evaluation of performance against documented indicators in key results areas • knowledge of performance measurement approaches and benchmarking.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports/examples of business plans and their outcomes • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of options for developing business plans • review of development of performance objectives and measures • review of how business plan was communicated to all relevant parties.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Advanced Diploma of Management.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Strategic**, **business and operational plan may include:	• previously formulated:
	  • action plan
	  • business goals
	  • competitor analysis
	  • financing arrangements or financial targets
	  • management arrangements and/or personnel requirements
	  • marketing approaches
	  • product or service research or analysis

Key stakeholders may include:	• business partners or financiers • customers • shareholders • staff • technical experts or advisers
Performance objectives and measures may relate to:	• efficiency measures • input measures such as staff time or dollars allocated • outcomes measures • qualitative indicators such as feedback from customers, effect on the wider market or competitors, staff reports • quantitative indicators, such as numbers produced and sold, turnover, customer satisfaction ranking, lower staff turnover

Business plan includes:	• description of the business
	• business products and services
	• marketing activity
	• financial indicators
	• productivity and performance targets for key result areas such as:
	  • community awareness or branding
	  • environmental impact

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RANGE STATEMENT	
	• governance or management • quality • sales • triple bottom line • workforce
Coaching refers to:	• informal on-the-job and off-the-job advice and training to improve performance

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBMGT618A Develop a contact centre business plan

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to develop, implement and maintain a business plan for a contact centre.

Application of the Unit

This unit applies in an environment where the candidate is required to develop and implement a business plan for the business unit in accordance with the overall organisational goals and objectives.

Competence in this unit requires developing, implementing and maintaining an effective business plan that achieves positive outcomes and supports the overall success and growth of the organisation. It requires understanding best practice, focus on continuous improvement activities, and the justification and presentation of the plan to the organisation.

This role is undertaken by staff with managerial responsibility or specialist staff, depending on the size and structure of the centre.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Analyse the current situation and evaluate alternatives	1.1. Use a broad range of information sources to identify ***best practice*** criteria and examples 1.2. Analyse current performance against best practice to identify improvement and business opportunities 1.3. Identify operating requirements and constraints imposed by internal and external customers and suppliers 1.4. Review and evaluate existing strategic and operating plans to identify opportunities for improvement 1.5. Propose viable alternatives to improve current situation and to exploit opportunities
2. Set objectives in alignment with corporate aims	2.1. Develop business objectives which represent business needs and global trends 2.2. Identify business objectives which support corporate aims 2.3. Consult with key ***stakeholders*** and other relevant parties to ensure consensus on objectives 2.4. Ensure objectives reflect a competitive position in the global market
3. Prepare a business plan	3.1. Develop a business plan based on agreed business objectives 3.2. Translate business objectives into a feasible strategy 3.3. Address all relevant operations in plans and justify any not addressed 3.4. Identify clear profitability, productivity and

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ELEMENT	PERFORMANCE CRITERIA
	performance targets in line with objectives 3.5. Identify financial, physical and human resources requirements to implement strategies 3.6. Include appropriate feedback and customer satisfaction measurement methods in business plan 3.7. Comply with enterprise requirements for business planning 3.8. Identify ***risks*** posed by business plans 3.9. Incorporate risk management strategies for identified risks
4. Present a business plan to senior management	4.1. Deliver an effective written and oral presentation of a business plan 4.2. Focus on critical aspects of the plan in the presentation 4.3. Articulate and resolve specific concerns and needs raised about the plan
5. Implement and maintain a business plan	5.1. Communicate plan to team, engage team members with the plan and obtain buy in from the team 5.2. Establish action plans, systems and processes to implement business plan 5.3. Conduct measurement programs to assess performance against business plan 5.4. Adjust systems or processes in response to performance variations to maintain business plan 5.5. Conduct regular substantive reviews of systems and processes 5.6. Communicate performance results and issues arising to relevant stakeholders

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to conduct effective formal and informal meetings and to communicate effectively with personnel at all levels
- analytical skills to understand complex ideas and concepts, and to articulate ideas and information effectively
- consultation and negotiation skills to develop and implement business plan

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- data and information gathering skills such as brainstorming, polling and interviewing
- information technology skills to effectively manage and analyse data and information
- leadership skills to gain trust, confidence and support of colleagues and clients
- presentation skills to develop and present reports or presentations that deal with numeracy skills to carry out analysis, and to produce graphs and presentations of workplace information and data to identify trends and patterns
- organisational skills to manage own tasks within timeframes
- problem-solving skills to create innovative solutions to problems that arise
- research and analytical skills to effectively undertake research and analysis of complex issues, options and information communication technology advances
- risk assessment and management skills to mitigate any risks that may impact on business plan outcome

Required knowledge

- best practice or benchmarking principles
- corporate aims and objectives
- key personnel, stakeholders and resources
- organisational communication methods
- organisational, statutory, regulatory and legislative requirements
- principles of cost/benefit analysis
- recent or impending advances in technology
- risk management techniques.

Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing, implementing, controlling and monitoring a contact centre business plan • knowledge of organisational, statutory, regulatory and legislative requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace information and data • access to information and databases for analysis activities

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	• access to relevant legislation, standards and guidelines • access to stakeholder feedback.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of business plan documentation • oral and/or written questioning to assess knowledge of global trends and best practice • review of stakeholder feedback • review of communication plan and stakeholder understanding and knowledge of plan • analysis of existing business plans • review of documentation of business objectives • direct observation of business plan presentation • review of management documentation endorsing the business plan • review of analysis of the performance of a business plan including statistical measurement.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Best practice may include:	• business model and structure • cost to serve • customer satisfaction • human resources management • identifying areas with exemplary processes • performance • training • use of technology

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Stakeholders may include:	• business unit staff (own team) • enterprise employees at management level with an interest in operations and performance outcomes • external clients and suppliers with an interest in business planning including contracting organisations, recruitment suppliers, software and equipment suppliers
Risks may include:	• damage to property/equipment • environmental • equipment/system failures • financial/economic loss/failure • industrial disputation • natural disasters • occupational health and safety • political events • product failure • professional incompetence • security failure (including criminal activities)

Unit Sector(s)

Management and Leadership - Management

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BSBMKG401B Profile the market

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to profile a target market or market segments in accordance with a marketing plan and to develop market positioning strategies. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a marketing team who are responsible for segmenting a target market to review alignment with organisational marketing objectives. This involves identifying viable market segments and profiling target consumers, and then defining the target market in more detail and developing strategies to position products and services. This unit is relevant to individuals working in a variety of marketing communications occupational roles, including advertising, direct marketing, promotional marketing, personal selling and public relations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Segment the market	1.1. Identify ***criteria*** for use in segmenting the market in accordance with the marketing plan 1.2. Identify and access ***sources of information for segmenting and profiling markets*** in accordance with the marketing plan 1.3. Segment the market in accordance with identified criteria 1.4. Review market segments for their usefulness in terms of factors such as their ***size***, ***potential***, ***distinctive needs***, ***easy identification of members*** or ***distinctive media use patterns*** 1.5. Select ***market segments*** to meet marketing objectives, and choose and apply new segmentation criteria if required
2. Identify the target	2.1. Evaluate ***approaches*** to determining and describing

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ELEMENT	PERFORMANCE CRITERIA
market	the total market for a product or service 2.2. Define the target market in terms of the consumers to be included as ***prospective users*** of a product or service, and the selected market segments 2.3. Use ***segment descriptors*** to describe the target market 2.4. Identify available ***strategic marketing options*** and select ***targeting strategies*** that best meet the requirements of the marketing plan
3. Profile the target audience	3.1. Describe the total market and selected market segments in the form of a consumer profile 3.2. Identify consumer characteristics in ***standard statistical terms*** and/or the descriptive terms used in media selection in the consumer profile 3.3. Use ***demographic*** and/or ***psychographic descriptions*** in the consumer profile in accordance with the requirements of the marketing plan 3.4. Describe consumer attitudes to products or services being offered 3.5. Ensure profile meets organisational requirements in terms of language, format, content and level of detail
4. Develop a positioning strategy	4.1. Identify available ***positioning strategies*** and choose a strategy to meet ***marketing requirements*** and consumer profile 4.2. Write a positioning implementation plan containing several options, in accordance with organisational requirements 4.3. Submit plan to supervisor within specified time lines and make appropriate adjustments based on feedback

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• creativity and innovation skills to select targeting and positioning strategies that meet organisation's requirements • culturally appropriate communication skills to relate to people from diverse

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REQUIRED SKILLS AND KNOWLEDGE

backgrounds and people with diverse abilities
• key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as:
  • Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice
  • Free TV Australia Commercial Television Industry Code of Practice
  • privacy laws
  • sweepstakes regulations
  • Trade Practices Act
• literacy skills to prepare reports and to interpret internal and external marketing information
• research skills to identify and analyse market segments and target markets.

Required knowledge

• Australian Marketing Institute Code of Professional Conduct
• data collection and analysis techniques
• industry knowledge including:
  • components of the marketing mix
  • elements of marketing planning
• marketing communications concepts and processes
• organisational structures, roles, responsibilities, business and marketing plans
• product and service standards and best practice models
• relevant legislation from all forms of government that may affect aspects of business operation in addition to those listed above, especially in relation to occupational health and safety, environmental issues, equal opportunity, industrial relations and anti-discrimination
• statistical terms used by the Australian Bureau of Statistics.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and	Evidence of the following is essential:

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EVIDENCE GUIDE	
evidence required to demonstrate competency in this unit	• developing a market positioning strategy that documents market segmentation, consumer profiling, targeting and strategies relevant to a product or service being offered to the marketplace.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace • access to information on past profiling, segmentation and targeting performed for a product or service.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following assessment methods are appropriate for this unit: • assessment of positioning implementation plan • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of the application of criteria to segment markets, selection of targeting strategies • oral or written questioning to assess knowledge and understanding • presentation of marketing profiling activities • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBMKG402B Analyse consumer behaviour for specific markets • BSBMKG507AInterpret market trends and developments.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised

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RANGE STATEMENT	
wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Criteria may include:	• attitude • average order value in units and dollars • desired benefits • business characteristics • consumer needs • demographics • geography • lifestyle • lifetime value in units, dollars and number of transactions • product or service usage • psychographics • recency and frequency of response to direct marketing activities • social and cultural factors
Sources of information for segmenting and profiling markets may include:	• advertising sales representatives • existing research data • industry sources • media representatives • original a priori research (where the market segments are assumed at the beginning and research is used to confirm them) • original response based research • owners or brokers of mail, email and phone lists • sales representatives • website operators
Usefulness in terms of ***size*** may include:	• segments which are large enough to justify the expense of creating distinctive offers and creative executions • small segments which are viable if telephone and email are used as communication media rather than other types of media
Potential may include:	• high response of market segment members to test campaigns • high response to previous campaigns by members of market segments

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RANGE STATEMENT	

Distinctive needs may include:	• specific price points
	• specific products or services
	• specific response vehicles such as:
	  • store visiting only
	  • website only response
	• specific timing of communications such as:
	  • day of week
	  • seasonality
	  • time of day

Easy identification of members may include:	• flags such as:
	  • postcode
	  • date of last purchase
	• geographical location of segment members, such as:
	  • city
	  • metropolitan region
	  • regional centre
	  • rural region
	  • state or territory
	• spending habits such as:
	  • one-off purchasers
	  • subscribers

Distinctive media use patterns may include:	• age • email use • ethnic language television, newspapers and radio • gender • internet use • mobile phone use • special interests
Selection of ***market segments*** may be contingent upon:	• expected frequency of purchase • expected lifetime as customers • expected volume of purchase • how efficiently segment members can be reached with targeted communications • one or more segments
Approaches may include:	• describing total market in dollar or unit terms as gross sales of all other products or services similar to those offered by the organisation

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RANGE STATEMENT	
	• describing total market in prospect terms as those most similar to current customers • identifying consumers with relevant needs • identifying current users of a product or service • identifying people with related characteristics
Prospective users may include:	• market segment users most similar to current customers

Segment descriptors may include:	• demographic descriptions
	• geographic descriptions
	• historic descriptions such as:
	  • volume of purchase
	  • frequency of purchase
	• psychographic descriptions

Strategic marketing options may include:	• advertising strategies such as:
	  • most cost effective creative executions
	  • most cost effective media or media vehicle for each segment
	  • most cost-effective media or media vehicle
	• distribution strategies such as:
	  • one-step
	  • multi-step
	• innovative strategies

Targeting strategies may include:	• anniversary of first purchase • concentrated, differentiated and mass strategies • de-duping prospect lists against customer lists • differentiation and segmentation • ease of entry • frequency of purchase • gender • geography of home or workplace • growth considerations • innovation • market share • media usage • niche markets • price sensitivity • purchasing power • recency of purchase • sales volume

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RANGE STATEMENT	

Standard statistical terms may include:	• categories used by the Australian Bureau of Statistics in collecting and reporting census data
	• media selection terms such as:
	  • behaviouristics
	  • demographics
	  • geo-demographic analysis of census data available from proprietary research suppliers
	  • geographic selections and segmentations

Demographic descriptions may include:	• age • date and place of birth • disability • education • first language • gender • household income • indigenous Australian • languages spoken at home • marital status • nationality • number and age of children • occupation
Psychographic descriptions may include:	• activities • affiliations • attitudes • interests • lifestyle • opinions • political views • values
Positioning strategies may include:	• competitive positioning • conspicuous positioning • convenience of use • convenience to buy • image perceptions • market follower positions • market leader positions • Me-Too positioning • prestige and exclusive positioning

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RANGE STATEMENT	
	• pricing • quality • repositioning • service positioning • uniqueness • value positioning
Marketing requirements may include:	• business-to-business marketing • direct marketing • ideas marketing • marketing of goods • public sector marketing • services marketing • telemarketing

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG402B Analyse consumer behaviour for specific markets

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to analyse consumer behaviour to target marketing to specific markets and specific needs. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a marketing team who need to analyse consumer behaviour to examine the factors that impact on decisions to purchase products or services. Having thoroughly analysed consumer attitudes and behaviour, recommendations can be made on marketing strategies to increase consumption of the product or service being marketed. This unit analyses consumer behaviour in greater detail than BSBMKG401B Profile the market, which covers more generic profiling, targeting, and positioning strategy development and planning. This unit is relevant to individuals working within a variety of marketing communications occupational roles including advertising, public relations, direct marketing, promotional marketing or personal selling roles.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Confirm product or service market	1.1. Gather ***information on the market or market segment*** for a product or service in accordance with the marketing plan 1.2. Identify consumer attributes for the market or market segment from the market profile or existing customer data 1.3. Identify and test features of the product or service in accordance with the marketing plan
2. Assess the reasons for existing levels of consumer interest	2.1. Investigate consumer need for the product or service through analysis of trends and past performance 2.2. Review past ***marketing*** or positioning of a product or service in relation to the effectiveness of its focus of appeal 2.3. Assess, test and estimate the impact of ***individual***,

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ELEMENT	PERFORMANCE CRITERIA
	social and lifestyle influences on consumer behaviour for a product or service 2.4. Analyse ***consumer responses*** to previous marketing communications 2.5. Assess ***organisational behaviour*** capability to respond quickly to consumer demand for products or services in accordance with the marketing plan
3. Recommend a focus of appeal for marketing strategies for a product or service	3.1. Ensure marketing strategies address innate and acquired needs of consumers and appeal to the motives that influence decision making 3.2. Present a rationale for the focus of appeal that outlines how influences on consumer behaviour will be used to target effective marketing strategies 3.3. Ensure the focus of appeal meets ***legal and ethical obligations*** and the budgetary requirements of the marketing plan

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to prepare reports with complex marketing concepts
- research skills to investigate overall market trends, past product/service performance and consumer behaviour characteristics.

Required knowledge

- key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as:
  - anti-discrimination legislation and the principles of equal opportunity, equity, and diversity
  - ethical principles
  - Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice
  - Free TV Australia Commercial Television Industry Code of Practice

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REQUIRED SKILLS AND KNOWLEDGE
• privacy laws • industry and product or service knowledge • marketing communication concepts and processes • organisational structure, procedures and marketing objectives.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documenting and presenting an analysis of consumer behaviour including recommendations on what marketing strategies should be developed to influence consumers to be more inclined to purchase a product or service • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to past marketing performance review documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports containing analysis of consumer behaviour and recommendations • demonstration of techniques to analyse consumer behaviour • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of analysis conducted and resulting recommendations • oral or written questioning to assess knowledge and

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EVIDENCE GUIDE	
	understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBMKG401B Profile the market • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Information on the market or market segment may include:	• customer segments such as:
	  • active customers
	  • inactive customers
	  • former customers
	• demographics
	• existing product usage
	• lifestyle
	• non-customer segments such as:
	  • core prospects
	  • non-core prospects
	• social and cultural factors
	• values or attitude factors

Marketing may include:	• business-to-consumer marketing • business-to-business marketing • direct marketing • ideas marketing • marketing of goods

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RANGE STATEMENT	
	• public sector marketing • services marketing • telemarketing
Individual influences may include:	• attitudes • beliefs • learning • past experience • perception • personality • self-image
Social influences may include:	• culture • family background • family decision-maker/s • social class • socioeconomic factors
Lifestyle influences may include:	• aspirations • interests • leisure activities
Consumer responses may include:	• average order value • preferred frequency of contact • preferred medium of contact • preferred medium of response • preferred order size • preferred price point for typical purchase • preferred range of options within a single offer
Organisational behaviour may include:	• contract buying • group decision making • modified re-purchase • new purchases • re-purchase

Legal and ethical obligations may include:	• codes of practice
	• cultural expectations and influences
	• ethical principles
	• relevant legislation
	• policies and guidelines
	• regulations
	• social responsibilities such as:
	  • protection of children
	  • environmental issues

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RANGE STATEMENT	
	• societal expectations

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG408B Conduct market research

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to conduct market research using interview and survey methodologies (not specialist statistical design and analysis) and to report on findings. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to non specialist market research personnel who have data and information gathering and analysis as a major part of their role and who are required to conduct market research. These individuals may work in areas such as marketing, communications, strategic planning and organisational development.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Conduct desk research to gather background market information	1.1. Conduct initial desk research using ***appropriate sources*** to gather background market information 1.2. Identify options for ***information collection and collation tools and methods*** 1.3. Determine and seek approval for ***reporting formats*** for market research documentation 1.4. Report initial research findings in approved formats in accordance with organisational procedures
2. Develop research methodology and objectives	2.1. Develop hypotheses and research objectives for market research 2.2. Identify options for quantifying data 2.3. Identify market research ***methodology*** and determine, develop, test and amend required ***survey tools*** 2.4. Determine and test methods of data extraction, collation and analysis
3. Recruit respondents	3.1. Interpret market research plans to identify ***potential respondents*** and their requirements 3.2. Identify respondents in line with ***research and organisational requirements*** 3.3. Recruit respondents in line with the agreed research methodology and organisational requirements

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ELEMENT	PERFORMANCE CRITERIA
4. Gather data and information from respondents	4.1. Prepare and arrange ***resources for data gathering*** 4.2. Gather data and information using survey tools 4.3. Record data and information gathered in approved formats, in accordance with organisational procedures 4.4. Store and safeguard survey information and data in accordance with organisational procedures
5. Analyse research information	5.1. Conduct ***checks*** on quality of data and information collected 5.2. Select ***appropriate techniques*** to summarise data and information 5.3. Design ***software files*** for entering data and information 5.4. Process data using a method appropriate to research design 5.5. ***Interpret and aggregate data and information*** including ***categorisation***, to provide observations relevant to research objectives
6. Prepare research reports	6.1. Collate and assess findings for relevance and usefulness to research objectives 6.2. Prepare ***research reports*** 6.3. Communicate research findings to relevant personnel and stakeholders in accordance with organisational procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- information management skills to categorise, store and retrieve market research information
- innovation and creativity skills to conceptualise, test and refine qualitative and quantitative questionnaires and other tools
- literacy skills to prepare reports containing complex ideas

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REQUIRED SKILLS AND KNOWLEDGE
• research and data collection skills to locate information sources, to design and analyse a market research strategy.
Required knowledge

• key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as:
  • anti-discrimination legislation and principles of equal opportunity, equity, and diversity
  • Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice
  • ethical principles
  • Free TV Australia Commercial Television Industry Code of Practice
  • privacy laws
• marketing communications concepts and processes
• market research principles and practices including:
  • data processing methods and data analysis techniques
  • design of samples
  • development and use of hypotheses
  • research reporting formats
  • roles and uses of qualitative and quantitative research
  • use of survey instruments
• requirements of house or other style manuals or protocols for written communication.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing and implementing a market research survey tool • accurately recording and securely storing survey data in accordance with organisational procedures

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EVIDENCE GUIDE	
	• utilising a range of methodologies to analyse market research information • documenting market research activities and findings in a research report.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources including computer hardware and software • access to exemplar survey tools and recently used survey tools.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • analysis of survey tools • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of data collection techniques • observation of presentations of market research results • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other marketing units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work

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RANGE STATEMENT	
situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Appropriate sources of background market information may include:	• published (including on the internet) data and information from:
	  • articles and advertisements
	  • business advisors
	  • clients and suppliers
	  • conferences
	  • government bodies
	  • industry associations and trade media
	  • other research projects
	  • reports from trade or professional associations annual reports
	  • reports to regulatory or funding bodies
	  • speeches
	• enterprise information such as:
	  • sales data
	  • attendance figures

Information collection and collation tools and methods may include:	• forms for recording information sources reviewed • procedures for abstracting key information and citing sources • rules for including or not including information and data reviewed

Reporting formats may include:	• prose reports
	• verbal presentations
	• visual aids, such as:
	  • charts
	  • photographs
	  • tables

Market research ***methodologies*** may include:	• brand equity research • brand name testing • concept testing • consumer decision process research • depth interviews • descriptive techniques • experimental techniques • focus groups • mystery shopping

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RANGE STATEMENT	
	• observational techniques • projective techniques • qualitative research • quantitative research • random sampling
Survey tools may include:	• handouts • one-on-one discussions • overhead transparencies • questionnaires • small group discussions
Potential respondents may include:	• current, past or potential clients • key stakeholders • persons identified from lists or directories • staff
Research and organisational requirements may include:	• legal requirements • need for respondent to meet demographic or psychographic criteria • need for respondent to represent an organisation, have specific expertise or knowledge, or meet other criteria • quality assurance policy and procedures • requirements for statistical validity in sampling
Resources for data gathering may include:	• appropriate venues and rooms • organisation of tables, chairs, audio and visual equipment, refreshments • audio-visual recording and display devices • telecommunications equipment and facilities

Checks may include:	• ensuring data is:
	  • a true record of interview
	  • accurate
	  • adequately expressed
	  • authentic
	  • complete
	  • not fabricated
	• ensuring others collecting data and information have studied and understood instructions
	• keeping records on data sources, copyright and privacy information
	• rejecting inadequate data and resurveying to overcome gaps

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RANGE STATEMENT	
	• reporting to senior personnel on issues and problems in data collection • where required, verifying records of interview with respondents
Appropriate techniques to summarise data may include:	• charts and tables • coefficient of variation • mean • median • mode • percentile • prose commentary • range • standard deviation • statistical detailed analysis • statistical overview • variance
Software files may include:	• databases with specified forms and fields • spreadsheets with specified axes • word processing programs with specified heading structures, text and table formats
Interpreting and aggregating data and information may include:	• development of further hypotheses based on initial processing of raw data, and statistical tests of these hypotheses • bringing together data or datasets • statistical analysis of raw data using general or specialist software
Categorisation may include:	• creation of a preliminary report table of contents with headings and subheadings under which data and information could be organised • data tabulation in a format appropriate for the type of analysis to be performed • development of basic market segmentation categories by demographic or psychographic characteristics
Research reports may include:	• detailed data analysis • explanation of methodology • key observations and findings • key summaries of data • recommendation and implementation issues • recommendations for future research • references, citations and other correct

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RANGE STATEMENT	
	acknowledgement for all non-original material

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG409A Design direct response offers

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to design, implement and evaluate direct response offers which match organisational business and marketing objectives and resolve marketing problems. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a marketing assistant or account manager role who are required to design direct marketing offers for products or services. Such individuals may work in small, medium or large enterprises across a variety of industries; they usually work with a team and customers to design offers. Direct response offers include payment related promises such as offers in relation to exchanging goods and services for money; terms of payment; performance and quality guarantees; delivery method; and time, place and method of order placement. Offers may also be made that do not involve payment matters, such as the offer of a free brochure or catalogue in return for providing a name and address.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Design offer components	1.1. Determine ***what will be supplied*** in direct response offer in conjunction with team members 1.2. Determine ***what the respondent must supply or do*** in response to offer 1.3. Select and document appropriate ***types of offer*** to be made to customers
2. Test direct response offers	2.1. Provide customers with a range of direct response offer ***options*** 2.2. Provide ***vehicles*** for customers to provide feedback on direct response offer options 2.3. Analyse customer responses to test offers and follow-up if appropriate 2.4. ***Modify products or services*** being offered based on

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ELEMENT	PERFORMANCE CRITERIA
	customer feedback provided 2.5. Ensure offer option selected matches organisational marketing objectives and solves ***marketing problems*** 2.6. Match supporting material requirements to ***type of direct marketing sale***
3. Select offer pricing structure	3.1. Evaluate ***factors affecting pricing*** to determine normal or average selling price of offer 3.2. Determine ***short-term pricing strategies*** 3.3. Select ***payment term options***
4. Determine and design required customer service levels	4.1. Design process that ensures accepted offers are fulfilled promptly 4.2. Develop procedures to ensure prompt answers to queries and complaints regarding product or service 4.3. Ensure access to instant, accurate information about status of delivery of products or services and customer accounts, including after-hours, to provide enhanced customer service

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- creativity and innovation skills to design a range of direct response offers which elicit interest and response from customers
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- interpersonal skills to build relationships with clients
- numeracy skills to determine pricing of offers
- organisational and time management skills to sequence tasks and to meet time lines
- problem-solving skills to provide solutions to customer requirements and to solve organisational direct marketing problems

Required knowledge

- teamwork skills to develop and refine direct response offers in response to customer feedback
- technology skills to use a range of office equipment (telephones, internet) and software (databases) to formulate and refine direct response offers.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • designing and testing a range of direct response offers which meet organisational marketing objectives • developing a pricing structure, customer service levels and relevant support materials for at least one product or service • presenting a direct response offer for a product or service.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of examples of direct response offers • demonstration of design, testing and refinement techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers • tests of knowledge on offer component, offer type, pricing structure, customer service and creative options for direct response offers.
Guidance information for	Holistic assessment with other units relevant to the

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EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended, for example: • BSBMKG410A Test direct marketing activities • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
What will be supplied may include:	• additional products or services • automatic delivery into the future • brochures • catalogues • entry in a prize draw • free trial periods • guarantees • instalment payment terms • premiums • product or service being offered • sales presentations • warranties

What the respondent must supply or do may include:	• responding to a telephone call
	• completing a response form
	• transmitting a response form
	• making a payment for things such as:
	  • insurance premiums
	  • order processing or account handling fees
	  • postage or freight fees
	  • product or service base price
	  • single or multiple instalments
	• providing information such as:
	  • address

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RANGE STATEMENT	
	• bank account details • birth date • credit card account details • email • gender • name • PayPal account details • phone number • selecting a payment method such as: • cash on delivery • cheque • company purchase order • credit card • e-cash • money order • wire transfer • selecting preferred delivery method such as: • delivery to third party transfer point • delivery to local, regional, national, continental or international location • pick up at supplier's premises
Types of offer may include:	• making a direct sale from the organisation • establishing an ongoing account where the response includes a commitment to future purchases such as: • continuity of supply • subscription • generating a lead for a direct sale • generating a lead for a sale by a third party such as: • retailer • wholesaler • agent • recording interest to generate information from customers and prospects which guides an organisation to modify existing offers and to create new offers
Options may include:	• providing alternatives on: • delivery methods

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RANGE STATEMENT	
	• order placement methods • payment methods • quantities available for purchase • what is available to buy
Vehicles for customer feedback may include:	• complaints forms • feedback forms • telephone hotlines • web response forms

Modifying products or services may include:	• adjusting, modifying, changing or replacing characteristics such as:
	  • appearance and behaviour of staff delivering products or services
	  • delivery methods
	  • design or content of brochures or catalogues sent in fulfilment of multi-step marketing offers
	  • maintenance and repair arrangements
	  • packaging
	  • quality, performance or customer satisfaction guarantee

Marketing problems may include:	• high response rate with low profitability • low average order value • low response rate and high cost per response

Type of direct marketing sale may include:	• one step sales requiring things such as:
	  • delivery details
	  • how to order
	  • presentation of products or services
	  • pricing of all possible response options
	• multi-step sales requiring things such as:
	  • sending catalogues
	  • presenting the product or service
	  • making a sales presentation
	  • visiting stores
	• third party sales

Factors affecting pricing may include:	• those based on gross margin targets • those based on economies of scale • discounts for volume purchases • fluctuations in purchasing cost of: • capital

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RANGE STATEMENT	
	• energy • labour • raw materials
Short-term pricing strategies may include:	• free or discount bonuses • introductory prices for new customers • sale prices

Payment term options may include:	• credit provided by a marketing organisation
	• leasing options such as:
	  • buyback
	  • hire purchase
	  • novated
	• which credit cards are accepted

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG410A Test direct marketing activities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to design, construct and implement a direct marketing test program, analyse its outcomes, and act upon its findings in order to increase the likely success of direct marketing activities. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a marketing assistant or account manager role who are required to design and test direct marketing activities in relation to a product or service. They may work in small, medium or large enterprises in a variety of industries and typically undertake controlled experiments to test direct marketing activities before designing and implementing the activity. The results of such testing can be analysed to predict the likely success of the proposed direct marketing activities. Direct marketing experiments may include testing the offer, media, communication, timing or response components of direct marketing activities.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Determine appropriate testing methods	1.1. Establish rationale for conducting tests on direct marketing activities 1.2. Determine ***testable components*** of direct marketing activities that can substantially affect test results or can be differentiated without affecting other components 1.3. Evaluate and select ***appropriate testing methods*** for ***media*** being used and ***media component*** being tested
2. Design and conduct a test	2.1. Create a range of hypotheses to be tested 2.2. Formulate a number of possible scenarios expected at conclusion of test 2.3. Select minimum and maximum number of test cells 2.4. Define control cells and establish a method to

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ELEMENT	PERFORMANCE CRITERIA
	identify all responses by cell of origin 2.5. Establish minimum significance variance in response 2.6. Apply test to selected offer components
3. Analyse and act upon test results	3.1. Use statistical techniques to analyse results 3.2. Determine whether test results provide a null, positive or negative result in relation to each hypothesis 3.3. Determine ***appropriate testing actions*** for results obtained 3.4. Refine, modify or change direct response offer components in accordance with testing results until final offer is created 3.5. Document and visually present testing results in format specified by organisational policies and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- information management skills to record, collate and transfer test results
- numeracy skills to interpret and analyse statistical information
- research and data collection skills to design and analyse tests of direct marketing offer components and direct marketing activities
- technology skills to use a range of office equipment and computers; and to use a range of statistical software applications, including databases, spreadsheets and specialist statistical programs relevant to marketing.

Required knowledge

- overview of key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations, such as:
  - Australian Direct Marketing Association (ADMA) Direct Marketing Code of Conduct and 'Do Not Mail' and 'Do Not Call' service register

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REQUIRED SKILLS AND KNOWLEDGE
• Free TV Australia Commercial Television Industry Code of Practice • privacy laws • sweepstakes regulations • Trade Practices Act • marketing communication concepts and processes • media options • statistical methods, tests, and techniques for measurement and analysis • software applications used in direct marketing.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • isolating and selecting a direct response offer component to be tested • creating and testing a range of hypotheses • conducting and re-running tests on offer components until a satisfactory outcome has been reached • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on testing activities • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of testing results • oral or written questioning to assess knowledge of statistical techniques

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EVIDENCE GUIDE	
	• review of test design.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Testable components may include:	• communication components such as:
	  • copy proposition, content, style, tone and personalisation
	  • art direction
	  • production values
	• offer components such as:
	  • product or service being offered
	  • additional products or services attached to the offer
	  • guarantees or warranties
	  • entry into a prize draw
	• media components such as:
	  • type of medium
	  • specific media channels
	  • appearance within a media channel
	• response components such as:
	  • response media selected
	  • response form characteristics
	• timing components such as:
	  • date
	  • day of the week
	  • time of day

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RANGE STATEMENT	
	• frequency of repetition • time gap between primary and secondary communications
Appropriate testing methods may include:	• nth record • split record • rotation • segmentation
Media may include:	• cable or satellite television • email • fax • free-to-air television • phone • print • website

Media components may include:	• specific channels within a medium such as:
	  • list segments
	  • lists
	  • programs
	  • specific publications
	• appearance within a specific channel such as:
	  • duration
	  • during ad break
	  • size
	  • on which program

Appropriate testing actions may include those for:	• null results in which the hypothesis is neither accepted or denied:
	  • re-running the test with larger test cells
	  • designing a new test for the same hypothesis
	  • designing a new test
	• positive results in which the hypothesis is accepted:
	  • adopting the winning cell as the new test control
	• negative results in which the hypothesis is denied:
	  • continuing with current control cells

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG411A Analyse direct marketing databases

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to collect, enhance, cleanse and analyse and utilise data for marketing purposes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals in entry level marketing roles who collect, analyse and store data such as customer or prospect lists, using databases in accordance with organisational procedures. Individuals undertaking these roles also analyse data to segment and profile prospective or existing customers, or to identify new direct marketing opportunities, prior to direct marketing offers being sent. Technical aspects in relation to designing, creating and generating reports from databases are covered in BSBITA401A Design databases.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Collect data	1.1. Determine purpose for acquiring data 1.2. Identify and analyse data requirements 1.3. Evaluate and select appropriate ***database system*** or database management service 1.4. Use ***appropriate methods*** to collect data or source data from external providers on prospects 1.5. Input and store data accurately, in accordance with organisational procedures and ***legal and ethical requirements***
2. Enhance, cleanse and update data	2.1. Retrieve data in accordance with organisational requirements 2.2. Check list against 'Do not call', 'Do not mail' register 2.3. Remove duplication from database 2.4. Regularly ***cleanse and update*** data files to maintain accuracy 2.5. Determine whether to outsource data enhancing to

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ELEMENT	PERFORMANCE CRITERIA
	third party services
3. Analyse and use data for direct marketing purposes	3.1. Segment and profile data according to ***demographic***, ***psychographic and behaviouristic characteristics*** 3.2. Assess quality of data 3.3. Identify database fields with cross-selling and value-adding opportunities, and any changes in consumer behaviour 3.4. Use data analysis findings to design or test new direct marketing offers or for other direct marketing purposes 3.5. Modify and enhance existing direct marketing offers or other marketing activities in accordance with analysis findings

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- information management skills to store, record, retrieve and update customer information in direct marketing databases
- numeracy skills to perform calculations on customer list data
- organisational and time management skills to sequence tasks and to meet time lines
- research and data collection skills to obtain lists and customer information
- technology skills to use a range of office equipment such as telephone systems and computers; and to use a range of software (spreadsheets, word processing packages, databases).

Required knowledge

- key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations, such as:
  - Australian Direct Marketing Association (ADMA) Direct Marketing Code of Conduct and 'Do Not Mail' and 'Do Not Call' service register
  - privacylaws
  - Trade Practices Act
- organisational policies, procedures, products, services and structure
- principles and techniques for recording, filing, and cataloguing data

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REQUIRED SKILLS AND KNOWLEDGE
• range of database software applications used in direct marketing.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • collecting, storing and accurately maintaining customer or prospect data used in a direct marketing campaign • segmenting and profiling customer data according to specified characteristics • analysing data to identify direct marketing opportunities and quality of data • using data to design or modify new or existing marketing activities • knowledge of relevant legislation, codes and standards.
Context of and specific resources for assessment	Assessment must ensure: • access to existing client lists and databases • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on data analysis activities • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of analysis, segmentation and profiling results or identification of marketing opportunities extracted from data • observations of database cleansing, updating and enhancement

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EVIDENCE GUIDE	
	• oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBITU404AProduce complex desktop published documents • BSBMKG401BProfile the market • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Database system may include:	• MS Access • MS Excel • in-house, custom built databases
Appropriate methods may include:	• acquisition of customer lists • business cards obtained from conferences, trade fairs and exhibitions • competition response forms • obtaining lists from list brokers • warranty forms
Legal and ethical requirements may include:	• codes of practice such as Australian Direct Marketing Association (ADMA) Code of Practice • cultural expectations and influences • ethical principles • relevant legislation such as: • copyright

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RANGE STATEMENT	
	• privacy • policies and guidelines • regulations • social responsibilities • societal expectations
Cleansing and updating may include:	• dealing with dead letters • dealing with unsubscribes • logging contact and payment details changes • managing bounceback emails • removing duplication • return-to-sender letters
Demographic characteristics may include:	• age • date and place of birth • disability • education • first language • gender • household income • Indigenous Australian • languages spoken at home • marital status • nationality • number and age of children • occupation
Psychographic characteristics may include:	• activities • affiliations • attitudes • interests • lifestyle • opinions • political views • values
Behavioristic characteristics may include:	• benefits sought by buyer • loyalty status of buyer • readiness stage of buyer • user status of buyer

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG412A Conduct e-marketing communications

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to prepare electronic advertisements for use in Internet, email or facsimile marketing communications, and to evaluate their effectiveness in achieving marketing objectives. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in advertising, public relations, marketing or promotional roles who are required to use electronic communications and existing business websites to effectively convey marketing communications and achieve marketing objectives in accordance with marketing or e-marketing plans.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare electronic advertisements	1.1. Choose ***media*** for ***electronic advertisements*** in accordance with the organisation's marketing (or e-marketing) strategy 1.2. Select multiple marketing channels to optimise marketing effort 1.3. Ensure copy and design elements communicate the desired image, features and benefits of the products or services, and suit the characteristics of the chosen media 1.4. Position and size each element of the advertisement to achieve balance and focus 1.5. Ensure typeface selections suit the product, the chosen media and the central message of the advertisement, and that the layout achieves balance in its elements including white space and margins 1.6. Ensure any added sound, animation or graphics enhance the content of advertisements and do not distract from the message 1.7. Ensure advertisements meet the requirements of the marketing strategy and ***legal and ethical requirements***

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ELEMENT	PERFORMANCE CRITERIA
2. Use business website as e marketing tool	2.1. Identify website marketing objectives in the organisation's marketing (or e-marketing) strategy and plan 2.2. Ensure the website design meets objectives and conveys the required image of the business and the features and benefits of its products or services 2.3. Ensure the website content, site map, navigation buttons, frames and multiple pages are in accordance with the marketing strategy and plan 2.4. Ensure the website incorporates data recording, contacts and feedback mechanisms to allow evaluation of the website as a marketing tool
3. Use electronic marketing	3.1. Identify the required media vehicles and website hotlinks for electronic advertisements, and negotiate contracts for website development where necessary to meet the requirements of the marketing strategy, budget and legal and ethical requirements 3.2. Promote marketing channels to identified target market segments 3.3. Place or disseminate electronic advertisements in accordance with the marketing strategy, media contracts and legal and ethical requirements
4. Monitor and evaluate results of e marketing	4.1. Monitor the transmission of the electronic advertisements or other e-marketing products and rectify any errors or omissions 4.2. Develop ***measures of effectiveness*** for e-marketing advertisements and monitor effectiveness 4.3. Evaluate the effectiveness of e-marketing advertisements against measures of effectiveness and record outcomes in accordance with organisational requirements 4.4. Use outcomes of evaluation activities and other feedback from marketing channels to plan for improvements to electronic marketing strategies and products

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- creativity and innovation skills for graphic and multimedia design to create advertisements
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to interpret marketing, advertising and creative requirements and create e-advertisements
- technology skills to use a range of computer equipment and software used in conducting electronic marketing, accessing the Internet and using multimedia applications

Required knowledge

- overview knowledge of key provisions of relevant legislation from all levels of government, codes of practice and national standards that affect business operations such as:
  - Australian Direct Marketing Association Limited (ADMA) DirectMarketingCodeofPractice
  - confidentiality requirements
  - copyright laws
  - defamation laws
  - FACTS (Federation of Australian Commercial Television Stations) codes
  - OECD International Guidelines for Consumer Protection in the Context of Electronic Commerce
  - Australian Government's PolicyFrameworkforConsumerProtectioninElectronicCommerce and the AustralianE-commerceBestPracticeModel
  - PrivacyAct1988 (Cth)
  - sweepstakes regulations
  - TradePracticesAct1974(Cth)
  - anti-discrimination legislation and principles of equal opportunity, equity, and diversity
- industry products and services knowledge
- intellectual property requirements
- organisational structure, roles and responsibilities
- principles of marketing and advertising
- software applications used in conducting electronic advertising and marketing

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing at least one electronic advertisement for a product or service using electronic media to convey marketing communications consistent with an organisational marketing strategy and objectives • monitoring and evaluating the results of electronic advertisements and marketing.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of electronic advertisements created and appropriateness of media used for the products or services • direct questioning with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of electronic advertisements • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members or colleagues.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • advertising units • other marketing units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Media may include:	• bulletins • chat rooms • email • facsimiles • websites
Electronic advertisements may include:	• auto responders • banner exchanges • bulk email • e-zine (electronic magazine distributed or accessed via a file server) and webzine (web-site distributed electronic magazine) advertising • e-zine and webzine publishing as a marketing tool • FFA sites • free or paid classifieds • news groups • search engine submission • web rings
Legal and ethical requirements may include:	• codes of practice • confidentiality • cultural expectations and influences • ethical principles • legislation • policies and guidelines • privacy • regulations • social responsibilities e.g. protection of children, environmental considerations • societal expectations
Measures of effectiveness may include:	• attitude measurements • awareness measurements • customer satisfaction ratings

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RANGE STATEMENT	
	• inquiry measurements • media vehicle audience measurements • opinion measurements • readership measurements • recall measurements • sales measurements

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG413A Promote products and services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to coordinate and review the promotion of an organisation's products and services. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of the promotion of products and services specific to an organisation. They may have responsibility to provide guidance or to delegate aspects of these tasks to others.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan promotional activities	1.1. Identify and assess ***promotional activities*** to ensure compatibility with ***organisational requirements*** 1.2. Plan and schedule promotional activities according to the marketing needs of the organisation 1.3. Determine overall promotional objectives in consultation with ***designated individuals and groups*** 1.4. Ensure that time lines and costs for promotion of activities are realistic and consistent with budget resources 1.5. Develop action plans to provide details of products and services being promoted
2. Coordinate promotional activities	2.1. Ensure ***personnel and resources*** to support promotional activities are identified and prepared to facilitate the achievement of promotional goals 2.2. Identify and agree ***roles and responsibilities*** for delivery of promotional services and allocate to relevant personnel 2.3. Establish and conduct relationships with targeted groups in a manner which enhances the positive image of the organisation 2.4. Use ***networks*** to assist in the implementation of promotional activities
3. Review and report on	3.1. Analyse audience feedback and data to determine

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ELEMENT	PERFORMANCE CRITERIA
promotional activities	the impact of the promotional activity on the delivery of products and services 3.2. Assess effectiveness of planning processes to identify possible improvements in future activities 3.3. Collect ***feedback*** and provide to personnel and agencies involved in promotional activity 3.4. Analyse costs and time lines to evaluate the benefits accruing from the promotional activities 3.5. Prepare conclusions and recommendations from verifiable evidence and provide constructive advice on future directions of promotional activities

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to read a variety of texts; to prepare general information and papers; and to write formal and informal letters according to target audience
- technology skills to select and use technology appropriate to a task
- problem-solving skills to manage contingencies in promotional activities
- numeracy skills to analyse data and to compare time lines and promotional costs against budgets.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - environmental issues
  - occupational health and safety (OHS)
- planning processes for organising promotional activities
- organisational marketing plan and associated budgets.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • designing and delivering promotional presentations • evaluating promotional impacts • presenting and advocating promotional strategies within the organisation • assessing and reporting on customer satisfaction
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of products/services and promotional strategies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of action plans developed for products and services being promoted • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • assessment of written reports.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other marketing, sales or public relations units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Promotional activities may include:	• advertisements • client functions • employee functions • media announcements • product launches • web pages
Organisational requirements may include:	• access and equity principles and practices • confidentiality and security requirements • defined resource parameters • ethical standards • filing and documentation storage processes • goals, objectives, plans, systems and processes • legal and organisational policies, guidelines and requirements • OHS policies, procedures and programs • payment and delivery options • pricing and discount policies • quality and continuous improvement processes and standards • quality assurance and/or procedures manuals • replacement and refund policy and procedures • who is responsible for products or services
Designated individuals and groups may include:	• colleagues • committees • customers • external organisations • line management • supervisor
Personnel and resources may include:	• management • marketing funds • organisational personnel • promotional products

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RANGE STATEMENT	
	• samples • technology • time • venue
Roles and responsibilities may include:	• Code of Conduct • job description and employment arrangements • marketing plans • organisation's policy relevant to work role • skills, training and competencies • supervision and accountability requirements including OHS • team structures
Networks may include:	• company • customer • internal • media and promotional • professional • social
Feedback may include:	• customer/client response • employee data • sales orders • market share data • focus groups

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

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Co-requisite units

Co-requisite units		

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BSBMKG414B Undertake marketing activities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan, implement and manage basic marketing and promotional activities. It is a foundation unit that covers general and basic marketing and promotional activities that do not require detailed or complex planning or implementation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	The unit applies to people with no previous experience in marketing. It could be undertaken as part of a broader role of a person in a small enterprise, or as part of a marketing plan for a larger enterprise.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Research marketing information	1.1. Research the concept of marketing as it applies to the organisation 1.2. Identify and analyse organisation's marketing plan and relevant policies and procedures 1.3. Identify ***need*** for ***marketing activities*** from the established marketing plan 1.4. Investigate previous marketing activities for relevant information 1.5. Identify profile of the market segment 1.6. Identify positioning and market mix for each target segment 1.7. Identify ***outcomes*** expected from marketing activities
2. Plan marketing activities	2.1. Undertake ***analysis*** of collected basic marketing information 2.2. Develop and document ***work activity plans*** for marketing activities 2.3. Obtain approval of plans from ***relevant enterprise personnel***
3. Implement marketing activities	3.1. Determine and access ***resources*** required for work activities 3.2. Undertake marketing activities within job role 3.3. Assist with assigning responsibilities and functions

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ELEMENT	PERFORMANCE CRITERIA
	to ***relevant personnel*** performing specific marketing functions 3.4. Monitor marketing activities, and review and amend activity plan as required
4. Review marketing activities	4.1. Measure and record outcomes of marketing activities 4.2. Review marketing activities against expected outcomes and record identified improvements 4.3. Prepare reports of marketing activities and communicate to relevant enterprise personnel

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- learning skills to:
  - select and use appropriate research methods
  - review and learn from marketing activities to contribute to the organisation's marketing operations
- literacy skills to:
  - prepare general information and papers for a target audience
  - read a variety of texts
  - write formal and informal letters
- planning and organising skills to develop implementation schedules
- problem-solving skills to address issues that may affect plans and their implementation
- research skills to:
  - research the concept of marketing
  - identify profile of marketing segment

Required knowledge

- basic foundations of marketing practices:
  - concept of marketing
  - marketing planning process
  - marketing mix

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REQUIRED SKILLS AND KNOWLEDGE
• segmentation • targeting and positioning • key provisions of relevant legislation and industry-specific regulations that may affect aspects of marketing, such as: • anti-discrimination legislation • codes of practice • competition legislation • consumer legislation • environmental issues • ethical principles • OHS legislation • privacy legislation • trade practices legislation • organisational policies and procedures relating to marketing • specific product knowledge related to products and services being marketed

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • research into the foundations of marketing practice and how they apply to an organisation • planning and implementing marketing activities • reviewing the effectiveness of the marketing plan • recording the activities and processes worked with.
Context of and specific resources for assessment	Assessment must ensure: • access to a workplace or simulated work environment • access to office equipment and resources • examples of products or services to be marketed • examples of marketing plans, policies and procedures.
Method of assessment	The following assessment methods are appropriate for this unit:

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EVIDENCE GUIDE	
	• direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of work activity plans for marketing activities • analysis of responses to case studies and scenarios • observation of presentations • oral or written questioning to assess knowledge of marketing techniques and strategies • analysis of documentation outlining the outcomes of marketing activities • review of marketing activity reports.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Need may be determined by:	• analysis of sales figures and other performance data • analysis of client information • direction from relevant enterprise personnel • development of new products and services.
Marketing activities may include:	• attendance at trade shows, conferences and other events • basic advertising • development and distribution of general promotional and informational materials • development and distribution of samples, case studies, testimonials and other evidence of enterprise activity • development of displays and signs • development of media releases, articles and media background information • information sessions for clients, suppliers and stakeholders

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RANGE STATEMENT	
	• online information • telephone promotions.

Outcomes may include:	• projections for:
	  • potential client enquiries
	  • detailed potential client follow-up
	  • sales and service levels.

Analysis may include:	• market definition, statistics and basic research • basic market segmentation • target audience profiles.
Work activity plans may include:	• activity monitoring and evaluation plans • detailed implementation plans covering the how, what and when of activities • financial plans • human resource plans • plans for other required resources • time plans.
Relevant enterprise personnel may include:	• coordinators • owners • managers • section leaders • supervisors • team leaders.
Resources may include:	• finance • human resources • resource contributions from suppliers and partners.
Relevant personnel may include:	• administrators • copywriters • desktop publishers • external consultants • graphic artists and designers • marketing specialists • printers and sign-writers.

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Business development - marketing

Co-requisite units

Co-requisite units		

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BSBMKG415A Research international markets

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake market research to select markets to pursue. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working with minimal supervision but with the support and assistance of a more senior person within the organisation. The activities will be focused on the target market and will involve communication and executing tasks across cultural and geographic barriers. The tasks involved in marketing goods and services internationally include selecting and implementing appropriate marketing activities, and monitoring and reviewing marketing performance.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Collect information about target markets	1.1. Identify ***target markets*** for market research for international markets from brief or manager 1.2. Confirm ***information requirements*** for market research 1.3. Seek ***assistance*** as required, with sourcing and accessing required information 1.4. Identify and access ***sources*** of required information
2. Investigate trends in target markets	2.1. Collate required information from information sources 2.2. Apply ***statistical analysis*** tools to information to identify ***trends*** 2.3. Seek assistance as required, with analysing required information 2.4. Investigate ***causal influences*** 2.5. Document and report identified trends and causal influences to relevant personnel within the organisation
3. Utilise data in decision making	3.1. Base ***decision making*** on available data 3.2. Check consistency of decision making against data, and document a rationale for decision making in

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ELEMENT	PERFORMANCE CRITERIA
	relation to markets to be pursued 3.3. Document and report recommendations to ***relevant personnel*** within the organisation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • research and data collection skills to maintain knowledge of potential opportunities • literacy skills to document research findings and recommendations • planning and organising skills to manage timelines.
Required knowledge

• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • International Commercial Terms (INCOTERMS)
  • trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act
  • Trade Practices Act
  • Warsaw Convention
  • World Trade Organisation determinations
• cultural aspects relevant to international markets researched
• market research techniques and tools
• required formats for reporting outcomes of research
• available external and internal information sources related to international markets.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the

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EVIDENCE GUIDE	
performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying and documenting trends in the target market • analysing information to validate trends • making decisions based on available data • knowledge of relevant Australian, international and local legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to relevant workplace documents • access to information sources used by candidate.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documenting and reporting of identified trends • analysis of responses to case studies and scenarios • observation of presentations of research about international markets • oral or written questioning to assess knowledge of cultural aspects relevant to international markets researched • assessment of documentation reporting decision making recommendations in relation to markets to be pursued.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • research units • international business units • other marketing units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Target markets may include:	• specific country or countries • geographic region/s within specific country or countries • specific sub-groups within selected areas • combinations of above
Information requirements may include:	• balance of payments data • competitors • cultural and social influences of consumers • demand and unmet demand • demographic data • economic and socioeconomic data • regulations on foreign investment • size of market segments • tariff and non-tariff barriers
Assistance may be sought from:	• Austrade, state/territory departments and agencies, chambers of commerce • industry or trade associations, other private organisations, consultants • manager and colleagues within organisation
Sources may include:	• academic publications and personnel • Austrade, state/territory departments and agencies, chambers of commerce • trade and business publications
Statistical analysis may include:	• measures of central tendency • measures of dispersion • nature and degree of relationship between variables • normal distribution probability curve • sampling • time series analysis

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RANGE STATEMENT	
Trends may include:	• buying patterns • changes in demand and unmet demand • demographics of decision maker/purchaser • imports versus local sales • seasonal variations
Causal influences may include:	• attitude towards Australia and Australian products and services • consumer awareness • cultural considerations related to values, beliefs • current availability of products or services • economic or socioeconomic factors • local alternatives to product or service • perceptions of potential consumers
Decision making may refer to:	• market entry strategy to be adopted • markets selected for more in-depth research • markets to be pursued
Relevant personnel may include:	• chief executive officer of organisation, board of directors • client for market research • manager or supervisor • marketing manager

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

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Co-requisite units

Co-requisite units		

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BSBMKG416A Market goods and services internationally

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to market goods and service internationally in line with the organisation's marketing plan and marketing strategy for a specified international target market. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of marketing who contribute well developed skills in creating solutions to unpredictable problems through analysis and evaluation of information from a variety of sources. They provide leadership and guidance to others and have limited responsibility for the output of others.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Select appropriate marketing activities	1.1. Access marketing plan and marketing strategy for specific international target market 1.2. Seek ***clarification*** as required, to interpret marketing plan and marketing strategy 1.3. Draw up a potential range of ***marketing activities*** 1.4. Select activities based on cultural and social appropriateness, cost, viability and suitability in relation to market research undertaken 1.5. Seek and obtain ***assistance*** as required, to select appropriate marketing activities 1.6. Document selected marketing activities with costs and rationale for selection and obtain ***approval*** for implementation
2. Implement international marketing activities	2.1. Prioritise marketing activities and obtain resources for their implementation 2.2. Brief ***persons*** involved in the marketing effort on their roles and responsibilities as members of a self-managed team to ensure the success of marketing strategies 2.3. Implement promotional activities in accordance with marketing objectives and budgetary requirements

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ELEMENT	PERFORMANCE CRITERIA
	2.4. Assign responsibility for ongoing monitoring of marketing activities and evaluate business performance against objectives and targets 2.5. Ensure implementation of marketing activities meets ***legal***, ***ethical and safety requirements***, ***and cultural considerations***
3. Monitor and review marketing performance	3.1. Monitor progress against performance, analyse performance gaps and take corrective action as required 3.2. Analyse over-performance against targets for trends and set new targets 3.3. Encourage all staff involved in marketing activities to propose ways to improve marketing performance 3.4. Implement ***processes*** to gather customer reaction to all aspects of the marketing mix to improve targeting and outcomes 3.5. Conduct ongoing research of customer and business requirements to identify ***opportunities for change and improvement*** and their timing 3.6. Analyse changes in market phenomena for new business opportunities

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills sufficient to document marketing activities and strategies
- communication and negotiation skills to seek and use feedback to improve current practice.

Required knowledge

- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - International Commercial Terms (INCOTERMS)

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REQUIRED SKILLS AND KNOWLEDGE
• trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act • Trade Practices Act • Warsaw Convention • World Trade Organization determinations • organisational client relationship strategy • marketing concepts, principles and strategies • evaluation and monitoring principles and strategies.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • implementing culturally appropriate marketing and promotional activities • monitoring market performance • identifying and making improvements to marketing activities and strategies • knowledge of relevant Australian, international and local legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant workplace documents • access to customer feedback • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace

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EVIDENCE GUIDE	
	reports of on-the-job performance by the candidate • review of documentation for selected marketing activities • analysis of responses to case studies and scenarios • observation of marketing presentations on goods and services • oral or written questioning to assess knowledge of evaluation and monitoring principles and strategies • assessment of analysis of changes in market phenomena for new business opportunities.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • international business units • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Clarification may be sought from:	• consultants • manager, supervisor or relevant specialist staff • specialist staff involved in marketing
Marketing activities may include:	• advertisements • client functions • demonstration activities • distribution of free samples • employee functions • media announcements • product launches • web pages
Assistance may be sought from:	• Austrade, state/territory departments and agencies, chambers of commerce

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RANGE STATEMENT	
	• industry or trade associations, other private organisations, consultants • manager and colleagues within organisation
Approval may be obtained from:	• client • manager or supervisor • owner of organisation, chief executive officer, board of directors
Persons may include:	• colleagues and self • consultants • overseas agents and representatives
Legal and ethical requirements and cultural considerations may include:	• cultural expectations and influences • environmental issues • ethical principles • legislation e.g. Trade Practices Act • policies and guidelines • regulations and codes of practice • safety issues • security and privacy issues • social responsibilities • societal expectations

Safety requirements may include:	• occupational health and safety considerations, for example:
	  • establishing procedures for staff safety and security at promotional events
	  • health and safety arrangements for contractors
	  • safe handling of equipment and substances
	  • safety of staff working in remote and isolated locations e.g. communication arrangements

Processes may include:	• advertisements • client functions • consultants • demonstration activities • distribution of free samples • employee functions • manager or supervisor or relevant specialist staff • media announcements • product launches

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RANGE STATEMENT	
	• specialist staff involved in marketing • web pages
Opportunities for change and improvement may include:	• ancillary services • delivery times/quality • market positioning • packaging • pricing structure • product/service configuration • raw materials

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG501B Identify and evaluate marketing opportunities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify, evaluate and take advantage of marketing opportunities by analysing market data, distinguishing the characteristics of possible markets and assessing the viability of changes to operations. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in senior marketing management roles who, together with a marketing team, identify, investigate and evaluate marketing opportunities to determine whether they meet organisational and marketing objectives. Based on this evaluation, changes to current business operations can be determined to take advantage of marketing opportunities. Adjusting the marketing mix in the light of new marketing opportunities is covered in BSBMKG502B Establish and adjust the marketing mix.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify marketing opportunities	1.1. Analyse ***information on market and business needs*** to identify ***marketing*** opportunities 1.2. Research potential ***new markets*** and assess opportunities to enter, shape or influence the market in terms of likely ***contribution to the business*** 1.3. Explore entrepreneurial, innovative approaches and creative ideas for their potential business application, and develop into potential marketing opportunities
2. Investigate marketing opportunities	2.1. Identify and analyse opportunities in terms of their likely fit with organisational goals and capabilities 2.2. ***Evaluate*** each opportunity to determine its impact on current business and customer base 2.3. Use an assessment of ***external factors***, costs, benefits, risks and opportunities to determine the financial viability of each marketing opportunity

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ELEMENT	PERFORMANCE CRITERIA
	2.4. Determine probable return on investment and potential competitors 2.5. Describe and rank marketing opportunities in terms of their viability and likely contribution to the business
3. Evaluate required changes to current operations	3.1. Identify and document changes needed to current operations to take advantage of viable marketing opportunities 3.2. Ensure organisational changes to service an increased or different customer base include provision for continued quality of service to existing customers 3.3. Estimate ***resource requirements*** for changed operations 3.4. Determine and communicate viability of making changes to current operations to ***key stakeholders*** 3.5. Document newly identified marketing opportunities and required changes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to identify and interpret market information, to write in a range of styles for different audiences and to document outcomes and requirements
- numeracy skills to calculate and evaluate financial information on new marketing options
- research and evaluation skills to gain information on and interpret market trends to identify marketing opportunities.

Required knowledge

- key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as:
  - anti-discrimination legislation and the principles of equal opportunity, equity

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REQUIRED SKILLS AND KNOWLEDGE
and diversity • ethical principles • marketing codes of practice and conduct such as the Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice; Free TV Australia Commercial Television Industry Code of Practice; and the Australian E-commerce Best Practice Model • privacy laws • Trade Practices Act • organisational marketing plan, structure, products and services • principles of marketing and the marketing mix • statistical methods and techniques to evaluate marketing opportunities, including forecasting techniques.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying and evaluating marketing opportunities to determine whether they will meet organisational objectives • documenting how current business operations will need to be modified and what resources will be required to take advantage of newly identified and evaluated opportunities.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to organisational strategic and marketing plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies

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EVIDENCE GUIDE	
	• assessment of written reports on identified marketing opportunities and evaluation activities • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations on opportunity identification, evaluation and required resources to capitalise on new marketing opportunities • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBMKG502B Establish and adjust the marketing mix • international business units • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information on market and business needs may include:	• comparative market information • competitors' performance • customer requirements • legal and ethical requirements • market share • market trends and developments • new and emerging markets • profitability

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RANGE STATEMENT	
	• sales figures
Marketing may include:	• business-to-business marketing • direct marketing • ideas marketing • marketing of goods • public sector marketing • services marketing • telemarketing
New markets may include:	• e-commerce • export markets • segments of the market not currently penetrated
Contribution to the business may include:	• effect on sales volume • growth • market share • profitability

Evaluation may include:	• investigation of:
	  • knockout factors
	  • present value analysis
	  • return on investment
	  • scored criteria
	  • weighted criteria

External factors may include:	• codes of practice • policies and guidelines • regulations • relevant legislation
Resource requirements may include:	• additional staff • distribution costs • equipment • production costs • promotional costs • research and development • re-tooling • staff training
Key stakeholders may include:	• Board of directors • finance staff • human resources staff • managers • marketing personnel

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RANGE STATEMENT	
	• owners • production staff • supervisors

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG502B Establish and adjust the marketing mix

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to determine the optimum marketing mix for a business through analysis of inter related marketing components. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals in marketing management roles responsible for developing the marketing and promotional mix within an organisation. They may also adjust the marketing mix when new marketing opportunities have been identified. The skills and knowledge required to evaluate and identify new market opportunities are covered in BSBMKG501B Identify and evaluate marketing opportunities.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Evaluate each component of the marketing mix	1.1. Identify key ***characteristics of products or services*** and estimate their significance to the market 1.2. Review pricing policy and analyse ***pricing variables*** to determine their effect on demand 1.3. Analyse ***promotional methods*** to determine their importance to ***marketing*** outcomes 1.4. Review ***channels of distribution*** and estimate their significance in relation to marketing outcomes 1.5. Identify and analyse ***level of customer service*** provision to determine its significance to marketing outcomes 1.6. Identify potential customer base and key pressure points for success 1.7. Analyse and test the effect of the components of ***marketing mix*** on each other, and establish their relative importance to customer base
2. Determine marketing	2.1. Identify and asses environmental factors for their

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ELEMENT	PERFORMANCE CRITERIA
mix for specific markets	impact on marketing mix 2.2. Identify ***consumer priorities***, ***needs and preferences*** that affect marketing mix 2.3. Consider product, pricing, promotional, distribution and service variations, and evaluate these against marketing objectives, target market characteristics and desired positioning 2.4. Select marketing mix that best satisfies target market and meets marketing objectives 2.5. Ensure marketing mix decision meets organisational, strategic and operational marketing objectives
3. Monitor and adjust marketing mix	3.1. Monitor marketing mix against marketing performance and isolate components for testing 3.2. Evaluate implications of altering one or more components of marketing mix in relation to market factors and consumer response 3.3. Adjust components of marketing mix in response to test results and evaluation of market response 3.4. Ensure adjusted marketing mix meets budgetary requirements 3.5. Ensure adjusted marketing mix continues to meet organisational, strategic and operational marketing objectives, and desired positioning

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • literacy skills to identify market information, to write in a range of styles for different audiences and to interpret requirements • numeracy skills to interpret testing results and to manage marketing budgets • organisational and time management skills to design and adjust a marketing mix.
Required knowledge
• key provisions of relevant legislation from all forms of government that may affect

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REQUIRED SKILLS AND KNOWLEDGE
aspects business operations, codes of practice and national standards such as: • anti-discrimination legislation and principles of equal opportunity, equity and diversity • ethical principles • marketing codes of practice and conduct such as the Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice; Free TV Australia Commercial Television Industry Code of Practice • privacy laws • Trade Practices Act • organisational policies, procedures, products and services • principles and concepts of marketing such as consumer or buyer behaviour and elements of marketing mix • statistical techniques.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• developing a report containing a description of activities undertaken to establish a marketing mix in an organisation, including information on each element of the marketing mix, such as:
	  • levels of customer service to be provided
	  • how a product or service will be distributed
	  • how a product or service will be priced
	  • whether additional products or services will be offered
	  • how the product or service will be promoted
	• reporting on at least one review of the success of marketing mix activities developed including coverage of any necessary adjustments made.

Context of and specific resources for	Assessment must ensure:

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EVIDENCE GUIDE	
assessment	• access to an actual or simulated workplace • access to office equipment and resources • access to organisational and marketing strategic plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on the marketing mix • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations on the marketing mix or changes made to the marketing mix • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBMKG501B Identify and evaluate marketing opportunities • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Characteristics of products or services may include:	• brand • brand loyalty

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RANGE STATEMENT	
	• compatibility with other products, services or equipment • degree of customisation • design • durability • ease of maintenance • features • flexibility • functional performance • innovativeness • occupational health and safety issues • packaging • pollution hazard reduction • quality • range of size, colour or other factors • reduction of risks to health and safety, such as noise • robustness • styling • technical features • upgrading • volumes available
Pricing variables may include:	• cost of ownership • credit terms • discount percentages • discount structure • financial deals • leasing arrangements • price point chosen • psychological elements • residual value • sales • special offers • stage payments

Promotional methods may include:	• impersonal promotion such as:
	  • advertising
	  • sales promotion
	• personal promotion such as:
	  • direct marketing
	  • face-to-face selling

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RANGE STATEMENT	
	• personal selling • segmentation
Marketing may include:	• business-to-business marketing • direct marketing • ideas marketing • marketing of goods • public sector marketing • services marketing • telemarketing
Channels of distribution may include:	• dealers • delivery service • distributors • e-business • franchisees • internet • mail order • podcasts • re-seller • retail • self-service • telesales • wholesale
Level of customer service may include:	• after sales service • call centre support • electronic client service • no customer service • one-on-one personal service • sales assistance for problems or queries only
Marketing mix may include:	• customer service variables • distribution variables • pricing variables • product or service variables • promotional variables
Customer priorities, ***needs and preferences*** may include:	• required or preferred products/services • preferred price point • preferred purchase volume in units and in dollars • preferred method of payment • preferred time and place for responding

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RANGE STATEMENT	

	• preferred time and place to take delivery
	• preferred medium to respond to direct response offers such as:
	  • in person
	  • mail
	  • phone
	  • website

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG506B Plan market research

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan market research by identifying market research needs, defining market research objectives, identifying data gathering approaches and developing a market research plan. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals in a non market research organisation who conduct market research planning at a managerial level. While market research planning can be undertaken as part of a broader role, it does require a good general knowledge of market research principles and practices, and a detailed understanding of the organisation's operations, objectives and the application of market research. This unit applies to managers who allocate responsibility to team members who conduct market research, covered by BSBMKG408B Conduct market research.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify market research needs	1.1. Communicate role of market research in enterprise operations to ***relevant personnel*** 1.2. Identify ***contribution of market research*** to enterprise activity 1.3. Analyse ***enterprise planning and performance documentation*** to determine ***research needs*** 1.4. Consult relevant personnel to determine research needs 1.5. Develop statement of market ***research needs***
2. Define market research objectives	2.1. Draft research objectives 2.2. Undertake preliminary ***project scoping*** 2.3. Consult with relevant personnel on draft research objectives to ensure relevant and useful information

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ELEMENT	PERFORMANCE CRITERIA
	is gathered 2.4. Review and finalise draft objectives in light of scoping parameters
3. Define data gathering approaches	3.1. Identify ***types of data*** required to inform objectives 3.2. Determine combinations of types of data to best inform objectives 3.3. Identify and evaluate suitable ***data gathering methods*** 3.4. Identify data sources 3.5. Quantify required data 3.6. Identify and evaluate suitable ***data processing methods*** 3.7. Make ***decisions*** in relation to data types, combinations, gathering methods, sources, quantities and processing methods
4. Develop market research plan	4.1. Estimate resources and time lines required for market research projects 4.2. Determine ***feasibility of market research projects*** 4.3. Prepare market research plan for approval 4.4. Obtain approval to implement plan from appropriate personnel as required

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• financial skills to set and manage market research budgets • negotiation skills to gain approval for proposals from senior management • organisational and time management skills to develop complex market research plans including time lines and options • research and data collection skills to determine organisational market research requirements.
Required knowledge
• key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such

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REQUIRED SKILLS AND KNOWLEDGE
as: • anti-discrimination legislation and principles of equal opportunity, equity and diversity • ethical principles • marketing codes of practice and conduct such as the Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice • privacy laws • Trade Practices Act • market research principles and practices including: • data processing methods and data analysis techniques • project design to meet given budgets and other resource constraints • design of samples • development and use of hypotheses • role of research in enterprise development • roles and uses of qualitative and quantitative research • use of survey instruments • project planning principles and practices including for: • consultation and stakeholder involvement • development of time lines, budgets and other implementation plans • gaining of approvals • needs analyses • scoping practices • statistical methods and techniques.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying and defining market research requirements in an organisation • developing a documented market research plan describing the scope, objectives, time and budget for

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EVIDENCE GUIDE	
	market research to be undertaken by an organisation.
Context of and specific resources for assessment	Assessment must ensure: • access to data and information records from previous marketing research activities • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of documented market research planning activity reports and plans • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of communication with team members and senior management to refine market research planning activities • observation of presentations on market research plan • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant personnel may include:	• clients • customers

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RANGE STATEMENT	
	• enterprise owners • managers • supervisors • suppliers

Contribution of market research may include:	• best practice
	• information about competitors, clients, stakeholders
	• information to enable predictions for:
	  • marketing
	  • policy making
	  • service development and delivery
	  • strategic planning

Enterprise planning and performance documentation may include:	• correspondence • financial reports • information about sales and sales force performance • internal reports

Research needs may include:	• research on competition:
	  • comparing consumer attitudes to an organisation's services and those of competitors
	  • identifying frequency of use of competitors' products and services
	  • identifying key competitors and their strengths
	  • measuring awareness
	• research on consumers:
	  • developing detailed consumer profiles
	  • identifying changes in attitudes and behaviour patterns
	  • identifying existing, potential or lapsed consumers
	• research on place:
	  • identifying attitudes towards location
	  • identifying cooperative opportunities for distribution of information or services
	  • identifying demand for products or services at other locations
	• research on pricing:
	  • identifying attitudes towards prices

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RANGE STATEMENT	
	• identifying costs • testing alternative pricing strategies • research on products and services: • evaluating competitors' products • evaluating consumer attitudes towards presentation and packaging • identifying potential new products or services or ones which may be at the end of their life cycle • measuring attitudes towards existing products or services • research on promotion: • measuring advertising and promotion effectiveness • testing alternative messages • testing and comparing different media options
Project scoping may include:	• human, financial and physical resources required and available • need for external market research assistance • possible research locations • possible research methodologies • possible sample size and nature of sample • time required and available to conduct research
Types of data may include:	• formal or informal comments and other feedback from client, customers, staff and others • government statistics • industry planning information • qualitative data • quantitative data • sales figures
Data gathering methods may include:	• case study investigation • focus groups • literature searches • mail surveys • one-on-one interviews in person or by telephone • personal observation of performance

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RANGE STATEMENT	
	• structured or informal small group discussions • supervised or unsupervised completion of questionnaires or other survey tools by respondents • use of questionnaires and other tools by staff to record data about enterprise activities
Data processing methods may include:	• data processing service experts • manual or personal methods • packaged analysis routines or programs • specialist software packages
Decisions may include:	• choices achievable with available resources, and costs and benefits of choices • choices consistent with organisational policies and procedures • choices that will best satisfy the research objectives
Feasibility of market research projects may include:	• likely ease of implementing the recommendations • quality and credibility of the methodology • ultimate usefulness of the research • whether similarly valid results can be obtained by other means

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBMKG507A Interpret Market Trends And Developments

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to conduct an analysis of market data in order to determine organisational and competitor business performance, and to prepare market and business forecasts that assist in targeting marketing activities and in drawing up a marketing plan. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to marketing professionals who use statistical techniques to analyse organisational and competitor marketing performance, and to interpret new and emerging trends when forecasting future business needs. Information gathered is used to assist in developing an organisation's marketing plan and to determine the current or potential future success of marketing strategies.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Interpret trends and market developments	1.1. Use ***statistical analysis*** of market ***data*** to interpret ***market trends and developments*** 1.2. Analyse market trends and developments for their potential impact on the business 1.3. Use ***measures of central tendency or dispersion and correlations*** between ***sets of data*** for quantitative interpretation of comparative market data 1.4. Perform qualitative analysis of ***comparative market information*** as a basis for reviewing business performance 1.5. Analyse the market ***performance of existing and potential competitors*** and their products or services, to identify potential ***opportunities*** or ***threats***
2. Analyse qualitative results	2.1. Analyse performance data from all areas of the business to determine success of marketing activities 2.2. Identify over-performing and under-performing

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ELEMENT	PERFORMANCE CRITERIA
	products and services to be considered for redevelopment or withdrawal 2.3. Forecast existing and emerging market needs based on information available using ***forecasting techniques***
3. Report on market data	3.1. Prepare, plot and interpret data for visual presentation 3.2. Assess visual presentation for potential problems, and take any necessary corrective action 3.3. Report on analysis of market data to meet organisational requirements in terms of content, format, level of detail and scheduling

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- facilitation and presentation skills to present statistical findings
- literacy skills to prepare reports containing complex ideas and concepts
- numeracy skills to use a range of statistical analysis techniques and elementary probability.

Required knowledge

- economic, social, and industry directions and trends
- key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as:
  - anti-discrimination legislation
  - consumer laws including appropriate state/territory legislation
  - ethical principles
  - marketing codes of practice and conduct such as the Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice
  - privacy laws
  - Trade Practices Act
- software applications especially spreadsheets and statistical packages, and use of the internet

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REQUIRED SKILLS AND KNOWLEDGE
• statistical methods and techniques, and reporting formats.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • applying a range of statistical techniques to analyse market trends and developments, current marketing performance and comparative market information • documenting analysis of market data including visual presentation of findings.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports presenting findings of statistical analysis • demonstration of statistical and forecasting techniques in the workplace • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended,

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EVIDENCE GUIDE	
	for example: • BSBMKG401B Profile the market • BSBMKG402B Analyse consumer behaviour for specific markets • BSBMKG501B Identify and evaluate marketing opportunities.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Statistical analysis may include:	• conversion rate of leads to sales
	• measures of central tendency particularly for such things as:
	  • average order value
	  • average response rate
	• measures of dispersion
	• nature and degree of relationship between variables
	• net response rate
	• normal distribution probability curve
	• sampling
	• time series analysis such as:
	  • speed of response curve
	  • recency or frequency grids
	  • lifetime value of customers
	  • net present value of customers

Data may include:	• charts • curves • graphs • spreadsheets
Market trends and developments	• changes in technology

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RANGE STATEMENT	
may include:	• changes in supplier prices • demographic trends • ecological and environmental trends • economic trends (local, regional, national, international) • government activities e.g. interest rates, deregulation • industrial trends • penetration of new technologies • social and cultural factors
Measures of central tendency or dispersion and correlations may include:	• cross-tabulations for grouped or ungrouped data • mean • median • mode • Z, T and chi square tests

Sets of data may include:	• geodemographic segmentations available from proprietary suppliers such as:
	  • ACORN
	  • MOSAIC
	  • PRIZM
	• segmentation by customer lists such as:
	  • average order value by units or dollars
	  • geography
	  • lifetime value by units, dollars and transactions
	  • recency and frequency or response/purchase
	• segmentation of the prospect list by:
	  • demographic match with customers
	  • geographic match with customers
	  • psychographic match with customers

Comparative market information may include:	• best practice information
	• books and articles, including:
	  • academic
	  • business
	  • general
	  • industry
	• brochures

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RANGE STATEMENT	
	• direct mail packages • documentaries and interviews on broadcast media • inter-firm comparison data • international benchmarking • internet • public or proprietary research • speeches

Performance of existing and potential competitors may include:	• comparisons about:
	  • corporate share price
	  • market share
	  • number of customers
	  • profitability
	  • sales in units or dollars

Opportunities may include:	• alliances
	• cooperative ventures
	• exports
	• extending, expanding or otherwise changing an existing business through:
	  • increasing customer numbers
	  • increasing average order value
	  • increasing lifetime value of the customer
	  • reducing costs of marketing
	  • improving current products/services
	  • developing new distribution channels
	• franchising
	• joint ventures
	• new products or services for existing markets
	• new products or services for new markets
	• potential for greater penetration of existing markets with existing products or services
	• strategic alliances

Threats may include:	• new competitor entering the market • new products or services being launched by existing competitors • increased number of inactive customers resulting in reduced average lifetime • reduced average order value resulting in reduced average lifetime value

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RANGE STATEMENT	
Forecasting techniques may include:	• Delphi techniques • model building • projection • scenario planning • surveys of intentions • top-down forecasting bottom-up forecasting

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG508A Plan direct marketing activities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan direct marketing activities that match organisational objectives. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals in a marketing management role who are responsible for planning direct marketing activities, including formulating direct marketing plans. They may work in small, medium or large enterprises across a variety of industries. People in this role develop the direct marketing plans and would usually supervise a team who would have the task of implementing the plans.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop direct marketing strategies	1.1. Develop customer acquisition strategies which include objectives related to numbers of new customers, cost of recruiting, media options and promotional activities within an overall budget 1.2. Develop customer retention strategies that relate to customer needs and wants, customer buying patterns, opportunities for up-selling or cross-selling, and customer renewals and reactivations 1.3. Develop customer loyalty strategies that address relationship marketing objectives and contribute to long-term partnerships
2. Select direct marketing activity	2.1. Analyse changes in market trends to identify and select direct marketing opportunities 2.2. Compare advantages and disadvantages of ***types of direct marketing activity*** 2.3. Select most appropriate direct marketing activity 2.4. Match direct marketing activity to business objectives
3. Produce a direct marketing plan	3.1. Document ***direct marketing objectives*** and purpose 3.2. Analyse previous response data to determine

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ELEMENT	PERFORMANCE CRITERIA
	performance gaps and required ***corrective actions*** 3.3. Calculate ***costs*** of direct marketing activities 3.4. Select ***methods to report and measure effectiveness*** of direct marketing activities 3.5. Assign responsibilities to team members for data capturing and reporting

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- creativity and innovation skills to identify new direct marketing opportunities based on changing market trends
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to write reports with complex concepts and ideas
- numeracy skills to set direct marketing budgets.

Required knowledge

- economic, social, industry, and media directions, trends, practices and techniques
- key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as:
  - Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice and 'Do Not Mail' and 'Do Not Call' service register
  - Free TV Australia Commercial Television Industry Code of Practice
  - privacylaws
  - sweepstakes regulations
  - Trade Practices Act
- organisational policies and procedures.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• developing a documented direct marketing plan providing information on the:
	  • objectives of the direct marketing activity
	  • type of direct marketing strategies and activities to be undertaken
	  • analysis of previous data and any corrective actions taken
	  • budget
	• methods to measure effectiveness.

Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to previous direct marketing activity data.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports • demonstration of direct marketing planning techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other marketing units • advertising units

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EVIDENCE GUIDE	
	• sales units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Types of direct marketing activity may include:	• advertising program such as:
	  • collecting data from advertisers to send a prospect to a third party
	  • prospect responding to advertiser
	  • purchasing a product or service from a third party
	• distribution program such as:
	  • direct purchase of product or service from advertiser
	• innovation program

Direct marketing objectives may include:	• net growth of customer base through:
	  • increase in acquisition
	  • reduced attrition
	• increased relationship building
	• target sales in units and dollars

Performance gaps may include:	• low response rate • cost per response too high • average order too low
Corrective actions may include:	• dropping under-performing segments • increasing frequency of contact to existing lists or audiences • offering inducements to purchase greater volume • testing or using more attractive offers • testing or using new lists or audiences • using less expensive communications tactics

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RANGE STATEMENT	
Costs may include:	• maximum profitable acquisition cost at current lifetime value of new customers • maximum profitable cost to generate average sale from existing customer segments
Methods to measure and report effectiveness may include:	• annual attrition rate • gross profit per message transmitted • net response rates • ration of marketing cost to sales income

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG509A Implement and monitor direct marketing activities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to implement, monitor and evaluate the effectiveness of direct marketing activities in accordance with an organisation's marketing plan. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in marketing management roles who are responsible for managing a team to implement direct marketing activities for a product or service. They may work in small, medium or large enterprises and across a variety of industries.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Allocate responsibilities for direct marketing activities	1.1. Critically analyse ***criteria for setting priorities*** for direct marketing activities, in accordance with marketing plan and organisational direct marketing requirements 1.2. Assemble ***required resources*** to conduct direct marketing activities 1.3. Brief staff and suppliers on their budgets, time lines, ***roles and responsibilities*** 1.4. Develop ***forms*** for conducting direct marketing activities and recording responses
2. Implement direct marketing activities	2.1. Schedule work on each campaign element according to lead times required for different ***media*** and in accordance with marketing plan 2.2. Ensure staff and suppliers meet agreed production schedule and budget 2.3. Identify any likely variations in production budget, raise with relevant persons as required and gain approval for variations 2.4. Make ***provisions to cover promotion over-performance*** 2.5. Implement direct marketing activities in accordance with direct marketing plan objectives 2.6. Ensure activities are implemented in accordance

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ELEMENT	PERFORMANCE CRITERIA
	with ***legal and ethical requirements***
3. Monitor direct marketing activities	3.1. Record responses at ***regular intervals*** throughout the campaign 3.2. Identify and use ***evaluation criteria*** to determine campaign effectiveness 3.3. Determine whether campaign is over-performing 3.4. Implement new targets and procedures to capitalise on positive over-performance 3.5. Modify direct marketing activities to extinguish ***non-profitable over-performance***
4. Determine continuous improvement opportunities	4.1. Analyse ***success indicators*** of direct marketing campaign 4.2. Document campaign performance in accordance with organisational reporting requirements 4.3. Encourage team members to identify and propose ways to improve campaign performance 4.4. Determine, document and assign responsibilities for required improvements to future direct marketing campaigns

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to ensure required resources are obtained from team members and external suppliers
- literacy skills to prepare reports with complex concepts and ideas
- numeracy skills to analyse performance of direct marketing activities and to run campaign budgets
- organisational and time management skills to sequence tasks and to meet time lines
- teamwork skills to support a team involved in direct marketing activities.

Required knowledge

- key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations, such as:
  - Australian Direct Marketing Association (ADMA) Direct Marketing Code of

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REQUIRED SKILLS AND KNOWLEDGE

Practice and 'Do Not Mail' and 'Do Not Call' service register
• Free TV Australia Commercial Television Industry Code of Practice
  • privacylaws
  • sweepstakes regulations
  • Trade Practices Act
• organisational policies and procedures
• software applications used in direct marketing activities such as databases.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • allocate responsibilities to team members and external suppliers for at least one direct marketing campaign • coordinate resources, tools and personnel required to implement direct marketing campaign • monitor and evaluate performance of direct marketing campaign • analyse campaign performance involving team at conclusion of campaign.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to marketing plan and past campaign performance data and information.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports • demonstration of direct marketing techniques in a workplace environment • direct questioning combined with review of

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EVIDENCE GUIDE	
	portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations on campaign performance • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBMKG410A Test direct marketing activities • BSBMKG514A Implement and monitor marketing activities • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Criteria for setting priorities may include:	• what needs doing first • what promises to deliver the highest return • what requires the greatest financial, human and other resources
Required resources may include:	• customer lists • data • databases • financial • software • staff
Roles and responsibilities may include:	• art direction • chasing data that has not been provided

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RANGE STATEMENT	
	• development of copy • development of design • media planning • media buying • obtaining lists
Forms may include:	• hard copy documents • digital offline (email) records • digital online (direct to database) records
Media may include:	• cable or satellite television • email • facsimile • free-to-air television • phone • print • website
Provisions to cover promotion over-performance may include:	• conducting thorough and rigorous sales forecasts • ensuring website can cope with high volume • having a buffer stock of product or service brochures or other promotional materials to cover better than expected response rates • taking steps to ensure availability of adequately trained call centre staff
Legal and ethical requirements may include:	• Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice • Free TV Australia Commercial Television Industry Code of Practice • privacy laws • state/territory regulations regarding sweepstakes • Trade Practices Act
Regular intervals may include:	• daily • hourly • three monthly • weekly

Evaluation criteria may include:	• average order size (units)
	• average order value (dollars)
	• calculating the total response in terms of:
	  • dollars
	  • orders

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RANGE STATEMENT	

	• units
	• cost per response
	• gross profit per attempted contact
	• response rate calculated as a percentage of attempted contacts such as:
	  • copies of publication distributed
	  • emails actually sent
	  • phones actually answered
	  • phones actually rung
	  • pieces actually mailed
	  • right party contacted
	• website click throughs
	• website visits

Non-profitable over-performance may include:	• customer service issues related to not following up leads quickly • excessive processing and fulfilment costs • low gross profit per contact • low margin • offer priced too low
Success indicators may include:	• customer satisfaction levels maintained or improved • materials delivered on time and within budget • number of responses and cost per response meeting budget • all tasks completed on time

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

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Co-requisite units

Co-requisite units		

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BSBMKG510B Plan e-marketing communications

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to research, prepare and evaluate an organisational e-marketing plan that integrates electronic communications and website marketing in support of marketing objectives. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to managers working in advertising, public relations, marketing or promotional roles who plan electronic communications to effectively convey marketing communication messages and support achievement of marketing objectives.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare an electronic marketing strategy or plan	1.1. In consultation with ***relevant personnel***, determine electronic marketing ***purpose*** and objectives that reflect the organisation's strategy, direction and values 1.2. Develop an electronic marketing (e-marketing) strategy or plan that addresses the aims and targets of the organisation's existing business or marketing plan, and is consistent with organisational and budgetary requirements 1.3. Develop a ***value proposition*** for the e-marketing strategy or plan 1.4. Identify, cost and detail ***electronic marketing tools*** for the organisation and its products and services in the e-marketing strategy or plan 1.5. Identify and incorporate electronic marketing approaches, tools and strategies to reach target market and achieve objectives 1.6. Ensure e-marketing strategy or plan includes an action plan, schedule and budget estimates for developing and implementing electronic marketing strategies 1.7. Ensure e-marketing strategy or plan includes ***effectiveness measures*** and meets ***legal and ethical requirements***

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ELEMENT	PERFORMANCE CRITERIA
2. Prepare and evaluate a website marketing strategy	2.1. Evaluate website marketing objectives to ensure they are consistent with e-marketing strategy or plan, and modify if required 2.2. Establish strategies for evaluation of the website as a marketing tool 2.3. Evaluate website design according to overall e-marketing strategy or plan to ensure the design projects required image of the organisation and conveys the features and benefits of products or services, and recommend modifications if required 2.4. Evaluate website data recording, contacts and feedback mechanisms as part of the website evaluation 2.5. Develop website marketing strategy in accordance with, and for inclusion in, e-marketing strategy or plan 2.6. Integrate website marketing strategy into the overall e-marketing strategy or plan 2.7. Evaluate effectiveness of website marketing strategy

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills toimplement marketing strategies
- initiative and enterprise skills to identify marketing approaches, tools and strategies that meet organisation's objectives
- learning skills to:
  - evaluate a website marketing strategy
  - learn from this evaluation to improve the organisation's operations
- literacy and numeracy skills to:
  - interpret organisational and budgetary requirements
  - write electronic marketing plans or strategies
- planning and organising skills to plan e-marketing strategies
- technology skills to use a range of computer software and electronic equipment when conducting electronic marketing

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge

• characteristics of a range of electronic marketing tools and:
  • associated benefits for use with e-marketing
  • challenges with implementation, for example costs, and availability of technology
• overview knowledge of key provisions of relevant legislation that affect business operations, codes of practice and national standards, such as:
  • Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice
  • Australian Communications and Media Authority (ACMA)Australian eMarketing Code of Practice
  • Australian Marketing Institute Code of Marketing Practice
  • confidentiality requirements
  • copyright laws
  • defamation and libel laws
  • Federation of Australian Commercial Television Stations (FACTS) codes
  • Organisation for Economic Cooperation and Development (OECD) Guidelines for Consumer Protection in the Context of Electronic Commerce
  • Australian government's policy framework for consumer protection in electronic commerce and the Australian E-commerce Best Practice Model
  • Privacy Act 1988 (Commonwealth)
  • sweepstakes regulations
  • Trade Practices Act 1974 (Commonwealth)
• foundation principles of marketing communications, consumer behaviour and opportunities for electronic marketing

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential: • development of an e-marketing strategy or plan for at least one product or service, containing:

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EVIDENCE GUIDE	
competency in this unit	• action plan • schedule • costings • monitoring strategy • evaluation methods • development of a website marketing strategy for a product or service that meets overall organisational e-marketing objectives.
Context of and specific resources for assessment	Assessment must ensure access to: • a workplace or simulated work environment • office equipment and resources • relevant organisational strategies and plans.
Method of assessment	The following assessment methods are appropriate for this unit: • assessment of reports outlining electronic and website marketing strategies and reports • review of portfolios of evidence and third-party workplace reports of the development of e-marketing and website marketing strategies • observation of presentations of strategies and plans • oral or written questioning about characteristics of e-marketing tools, and their benefits and challenges • review of case studies about e-marketing strategies.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant personnel may include:	• business owners • in-house, outsourced or otherwise contracted personnel • management

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RANGE STATEMENT	
	• technology personnel.
Purpose may include:	• building and maintaining customer relationships through electronic communications • collecting direct responses • distributing information via internet • generating leads by attracting potential customers • internet advertising • online transactions.
Value proposition may include:	• benefits a company can derive from using electronic commerce • benefits a company's products or services provide to customers • consumer need that is being fulfilled.

Electronic marketing tools may include:	• electronic advertisements, such as:
	  • affiliate marketing
	  • auto responders
	  • banner exchanges
	  • bulk email
	  • directory listing
	  • e-zine and webzine publishing as a marketing tool
	  • free for all (FFA) sites
	  • free or paid classifieds
	  • news groups
	  • pop-up advertisements
	  • search engine submission
	• interactive TV
	• media, such as:
	  • bulletins
	  • chat rooms
	  • emails
	  • facsimiles
	  • websites
	• mobile technology, such as:
	  • 3G mobile phones
	  • personal digital assistants (PDAs)
	• online, such as:
	  • catalogues
	  • customer services

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RANGE STATEMENT	
	• press releases • surveys • web rings.
Effectiveness measures may include:	• attitude measurements • awareness measurements • customer satisfaction ratings • inquiry measurements • media vehicle audience measurements • opinion measurements • readership measurements • recall measurements • sales measurements.
Legal and ethical requirements may include:	• codes of practice, e.g. Australian eMarketing Code of Practice • confidentiality • cultural expectations and influences • ethical principles • legislation • policies and guidelines • privacy • social responsibilities e.g. protection of children and environmentally sustainable practices • societal expectations.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business development - marketing

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Co-requisite units

Co-requisite units		

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BSBMKG511A Analyse data from international markets

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to analyse data from international markets. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for interpreting international trends and market developments, interpreting competitor market performance and reporting on market data. The purpose and intent of reporting on market data is to assist the organisation to target marketing activities and to draw up marketing plans.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Interpret trends and market developments	1.1. Use ***statistical analysis*** of Australian and international market data to interpret international market trends and developments 1.2. Analyse ***trends and developments*** within Australia and relevant international settings for their potential impact on international business activity within target market 1.3. Identify ***aspects of culture*** that may have an impact on international business activity within target market 1.4. Use ***measures of central tendency***/***dispersion and correlations*** between sets of data for quantitative interpretation of comparative international market data 1.5. Perform qualitative analysis of ***comparative international market information*** as a basis for reviewing business performance in international settings
2. Interpret competitor market performance	2.1. Analyse the international market performance of existing and potential competitors and their products or services to identify potential ***opportunities*** or threats 2.2. Compare international business performance to that of competitors to identify market position

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ELEMENT	PERFORMANCE CRITERIA
3. Report on market data	3.1. Prepare, plot and interpret data for ***visual presentation*** 3.2. Assess visual presentation for potential problems and take corrective action if necessary 3.3. Ensure report meets organisational requirements in terms of content, format and level of detail 3.4. Submit report within the required timeframe

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to profile international markets, audiences and segments
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- evaluation and assessment skills to investigate international business opportunities
- literacy skills to write reports with complex ideas and concepts
- technology skills to use a range of software to collect and analyse international market data.

Required knowledge

- cultural, historical, political, economic and general knowledge of international events that may have an impact on international business activity
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - Customs Act
  - Dangerous Goods Act
  - International Commercial Terms (INCOTERMS)
  - trade modernisation legislation: Customs Legislation Amendment and Repeal Act, Import Processing Charges Act, Customs Depot Licensing Charges Amendment Act
  - Trade Practices Act
  - Warsaw Convention
  - World Trade Organisation determinations
- sources of external and internal information on international markets

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REQUIRED SKILLS AND KNOWLEDGE
• research, data analysis and statistical analysis techniques relevant to market data • variety of statistical techniques for use in analysing market data.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • analysis of market data to inform the process of targeting marketing activities and the drawing up of a marketing plan • examples where the candidate has analysed and reported on market data, including interpreting trends and market developments and competitor market performance data • documentation of results of analysis in a report • knowledge of cultural, historical, political, economic and general knowledge of international events that may have an impact on international business activity.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to workplace documents including completed reports • access to information sources used by candidate.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of comparison of international business

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EVIDENCE GUIDE	
	performance to that of competitors • analysis of responses to case studies and scenarios • demonstration of data analysis techniques • observation of presentations • oral or written questioning to assess knowledge of international markets and strategies • assessment of data analysis reports.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBMKG517AAnalyse consumer behaviour for specific international markets.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Statistical analysis may include:	• measures of central tendency • measures of dispersion • nature and degree of relationship between variables • normal distribution probability curve • sampling • time series analysis
Trends and developments may include:	• changes in technology • demographic trends • ecological/environmental trends • economic trends (local, regional, national, international) • government activities e.g. interest rates, deregulation • industrial trends • political events such as:

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RANGE STATEMENT	
	• wars • internal conflicts • forthcoming elections • social and cultural factors
Aspects of culture may include:	• attitude of overseas countries to Australia and Australians • degree of fiscal conservatism or liberalism within culture • family structures, and usual purchasers and decision makers in families • religion • values and beliefs
Measures of central tendency/dispersion and correlations may include:	• benchmarking against Australian performance • cross-tabulations • grouped or ungrouped data • inter-firm comparison data • international benchmarking • mean • median • mode • Z, T and chi square tests
Comparative international market information may include:	• benchmarking against Australian performance • best practice information • inter-firm comparison data • international benchmarking
Opportunities may include:	• cooperative ventures • extending, expanding or otherwise changing an existing business • franchising • joint ventures • new products or services for existing markets • new products or services for new international settings or within other regions of existing international settings • potential for greater penetration of existing markets with existing products or services • strategic alliances
Visual presentation may include:	• desktop published reports of market data • graphical data including pie/bar/column graphs

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RANGE STATEMENT	
	• material using a variety of media such as video, audio, CD-ROM, photographs, slides, film

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG512A Forecast international market and business needs

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to gather intelligence about the target international market and to use that information in the business. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for forecasting international and business needs including collecting market intelligence, reviewing current business performance and capability, evaluating specific markets and documenting how the business can meet current and emerging needs of the target market.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Collect market intelligence	1.1. Gather and document market intelligence through networking activities and participation in activities such as trade fairs, conferences, and/or professional development activities 1.2. Identify and access further ***sources*** of market intelligence 1.3. Evaluate commercial services providing market intelligence for value-for-money and quality of market intelligence, and access as required 1.4. Collate and analyse market for relevance and applicability to the organisation's international business activity and undertake an ***evaluation*** of marketing performance
2. Review current business performance and capability	2.1. Confirm core activities, customer base, business values and current business direction 2.2. Identify current international marketing performance and effectiveness of past international ***marketing*** or positioning 2.3. Review ***performance data*** from all ***areas of the business*** to identify strengths, weaknesses and critical success factors relevant to international business activity 2.4. Identify and assess current ***capabilities and resources*** to identify areas for improvement or

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ELEMENT	PERFORMANCE CRITERIA
	exploitation within international markets 2.5. Identify under-performing products or services within international markets for re-development or withdrawal 2.6. Confirm the strength and current competitive position of the business within international markets
3. Evaluate the specific market	3.1. Identify and analyse ***trends and developments*** having an impact on international business activity for their potential impact on the business 3.2. Gather and analyse ***comparative international market information*** as a basis for reviewing business performance 3.3. Analyse the market performance internationally of existing and potential competitors and their products or services to identify potential ***opportunities*** or threats within international business markets 3.4. Identify and tap sources of intelligence for advance warning of new products, services, technology or new international markets for the business 3.5. Identify and analyse the ***legal***, ***ethical and environmental constraints*** of the international market for their effect on international business activity
4. Document how business can meet current and emerging needs of the target market	4.1. Identify, analyse and document poor/under-servicing of existing international market needs by the organisation and/or its competitors 4.2. Identify changes in international markets that link positively to the organisation's strengths or capabilities 4.3. Consider the advantages and disadvantages of ***forecasting techniques*** in relation to the required outcome, and select technique/s in accordance with organisational requirements 4.4. Forecast and justify emerging international market needs in terms of available information 4.5. Identify the needs of the business in terms of changes required to improve performance or to address an international market opportunity

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to evaluate current business performance
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- evaluation and assessment skills to gather and analyse international market and business requirements when creating market forecasts
- forecasting skills
- literacy skills to write reports with complex ideas and concepts
- market analysis skills
- technology skills to use a range of software to create forecasts.

Required knowledge

- cultural, historical, political, economic and general knowledge of international events that may have an impact on international business activity
- market analysis tools
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - occupational health and safety
  - privacy
  - Trade Practices Act
  - World Trade Organisation determinations
- software programs and electronic media available to conduct forecasting
- sources of external and internal information on international markets
- range of products or services marketed by business in international settings.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	

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EVIDENCE GUIDE	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• undertaking of analysis to forecast international market and business needs, including:
	  • collection of market intelligence
	  • review of current business performance and capability
	  • evaluation of specific international markets
	• written report of how the business can meet current and emerging needs of targeted international markets
	• knowledge of market analysis tools.

Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to relevant information sources • access to workplace documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of performance data from all areas of the business • analysis of responses to case studies and scenarios • observation of techniques used to gather market intelligence • oral or written questioning to assess knowledge of sources of external and internal information on international markets • analysis of trends and developments having an impact on international business activity in terms of their potential impact on the business • assessment of forecast of emerging international market needs.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • international business units

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EVIDENCE GUIDE	
	• other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Sources may include:	• business advisory services • commercial sources of market intelligence provided by specialists and consultants • databases • financial institutions • information from Austrade and state/territory government agencies, chambers of commerce • internet • new networking opportunities • official statistics • peers • professional/trade associations and publications
Evaluation may include:	• comparative analysis • competitive analysis • life cycle models • product portfolio analysis • strengths-weaknesses-opportunities-threats (SWOT) analysis • value chain analysis
Marketing may include:	• business-to-business marketing • direct marketing • e-business • ideas marketing • marketing of goods • public sector marketing • services marketing • telemarketing

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RANGE STATEMENT	
Performance data may include:	• accidents • complaints • coverage • faults • penetration • production time and cost • profitability • sales • share • warranties
Areas of the business may include:	• finance • marketing • overseas representatives or branches of the organisation • personnel • production

Capabilities and resources may include:	• situational factors such as:
	  • 24-hour operation
	  • age and life of business equipment
	  • capacity of equipment relative to current output
	  • communications
	  • competence of staff relative to business needs
	  • human and financial resources
	  • industrial relations climate
	  • level of technology
	  • location/position
	  • transport distribution channels
	• intangibles such as:
	  • brand
	  • 'feel good' factor
	  • image
	  • perceived quality or value
	  • service
	  • social acceptability
	  • style

Trends and developments may	• changes in technology • demographic trends

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RANGE STATEMENT	
include:	• ecological/environmental trends • economic trends (local, regional, national, international) • government activities e.g. interest rates, deregulation • industrial trends • political events (wars, internal conflicts, forthcoming elections) • social and cultural factors
Comparative international market information may include:	• benchmarking against Australian performance • best practice information • inter-firm comparison data • international benchmarking
Opportunities may include:	• consideration of applications and costings for trademarks, patents and standards accreditation • cooperative ventures • extending, expanding or otherwise changing an existing business • franchising • joint ventures • new products or services for existing markets • new products or services for new international settings or within other regions of existing international settings • potential for greater penetration of existing markets with existing products or services • strategic alliances
Legal, ***ethical and environmental constraints*** may include:	• Australian, international and local context of legal and ethical obligations • codes of practice • cultural expectations and influences • ethical principles • legislation • policies and guidelines • regulations • social responsibilities such as protection of children, environmental issues • societal expectations
Forecasting techniques may include:	• bottom-up forecasting • Delphi techniques • model building

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RANGE STATEMENT	
	• projection • scenario planning • surveys of intentions • top-down forecasting

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG513A Promote products and services to international markets

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to promote products and/or services of the business within specified international markets. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for promoting products and/or services to international markets. This includes planning, coordinating, reviewing and reporting on promotional activities. Management of promotional activities may involve geographic separation from these activities.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan promotional activities	1.1. Access marketing plan for international business activity to inform planning of promotional activities 1.2. Access relevant ***information sources*** to support planning of promotional activities 1.3. Identify and assess ***promotional activities*** to ensure compatibility with ***organisational requirements*** and ***cultural appropriateness*** 1.4. Plan and schedule promotional activities according to the marketing needs of the organisation 1.5. Determine overall promotional objectives in consultation with ***designated individuals and groups*** both in international and domestic settings 1.6. Ensure time lines and costs for promotion of activities are realistic and consistent with budget resources 1.7. Develop action plans to provide details of products and/or services being promoted
2. Coordinate promotional activities	2.1. Identify and prepare ***personnel and resources*** to support promotional activities, both in international and domestic settings, to facilitate the achievement of promotional goals 2.2. Identify, agree upon and allocate ***roles and responsibilities*** of overseas and domestic personnel for delivery of promotional activities

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Establish and conduct relationships with targeted groups in overseas settings in a manner which enhances the positive image of the organisation 2.4. Supervise and support roles and responsibilities of overseas personnel involved in promotional activities 2.5. Use ***international business networks*** to assist in the implementation of promotional activities
3. Review and report on promotional activities	3.1. Analyse audience feedback and data to determine the impact of the promotional activity on the delivery of products and/or services 3.2. Assess the effectiveness of planning processes to identify possible improvements in future international promotional activities 3.3. Collect and provide ***feedback*** to personnel and agencies involved in the promotional activity both in international and domestic settings 3.4. Analyse costs and time lines to evaluate the benefits accruing from the internationally based promotional activities 3.5. Prepare conclusions and recommendations from verifiable evidence and provide constructive advice on future directions of internationally based promotional activities

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- interpersonal skills to establish rapport and build relationships with clients
- organisational and time management skills to sequence tasks and meet time lines
- research, data collection, assessment and evaluation skills to determine appropriate promotional activities for international markets
- technology skills to record and use information gathered about promotional activities.

Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE

• available overseas media
• cultural characteristics of groups within target market
• international business networks
• marketing strategies and promotional activities
• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • bilateral or regional trade agreements
  • occupational health and safety (OHS)
  • Trade Practices Act
  • World Trade Organisation rules.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of planning, coordinating and reviewing of promotional activities to align with marketing plans and market research undertaken for the international markets selected • report detailing promotional activities undertaken and recommendations to inform and guide future promotional activities in international settings • knowledge of relevant Australian, international and local legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to workplace documents including completed reports • access to feedback on activity from overseas personnel/clients.

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on promotional activities • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations promoting goods, services or organisation to international clients or business associations/networks • observation of techniques used when undertaking promotional activities • oral or written questioning to assess knowledge of cultural characteristics of groups within target market • review of action plans developed to provide details of products and/or services being promoted • analysis of audience feedback and data • assessment of conclusions and recommendations prepared and advice on future directions of internationally based promotional activities.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • international business units • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information sources may include:	• academics and training providers • Austrade and other Australian, state/territory

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RANGE STATEMENT	
	government departments and agencies • overseas embassies, consulates, government departments and agencies within Australia and overseas • trade and industry publications
Promotional activities may include:	• advertisements • client functions • demonstration activities • distribution of free samples • employee functions • media announcements • product launches • web pages
Organisational requirements may include:	• access and equity principles and practice • allocation of responsibilities for products and/or services • confidentiality and security requirements • consideration of cultural issues • defined resource parameters • ethical standards • filing and documentation storage processes • goals, objectives, plans, systems and processes • legal and organisational policy/guidelines and requirements • OHS policies, procedures and programs • payment and delivery options • pricing and discount policies • quality and continuous improvement processes and standards • quality assurances and/or procedures manuals • replacement and refund policy and procedures
Cultural appropriateness refers to:	• appropriateness of activity related to the culture of countries selected for promotion of products and/or services
Designated individuals and groups may refer to:	• colleagues • committees • customers • external organisations such as Austrade, state/territory government departments and agencies, chambers of commerce • line management

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RANGE STATEMENT	
	• supervisor
Personnel and resources may refer to:	• contractors engaged for specific purposes within promotional activity • management • marketing funds • organisational personnel both in international and domestic settings • promotional products • samples • technology • time • venue
Roles and responsibilities may include:	• codes of conduct • considerations of cultural issues • contractual arrangements with consultants or specialists hired for promotional activity • job description and employment arrangements • marketing plans • organisation's policy relevant to work role • skills, training and competencies • supervision and accountability requirements including OHS • team structures
International business networks may refer to:	• formal or informal networks • government sponsored networks through Austrade or state/territory government agencies, chambers of commerce • individuals, groups, organisations • personal or business networks • professional or trade networks
Feedback may be collected from:	• customer/client response data • employee data • focus groups • market share data • sales orders • word-of-mouth reports

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG514A Implement and monitor marketing activities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to implement marketing activities described in a marketing plan, to monitor their effectiveness in meeting organisational marketing objectives, and take actions to improve marketing performance. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in marketing management positions who are responsible for implementing and monitoring organisational marketing strategies. In this role they would usually lead and coordinate a marketing team, implement the marketing plan, monitor the performance of marketing strategies and evaluate their effectiveness. They also involve team members in identifying improvements to marketing strategies and formulating recommendations for future marketing activities.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Implement marketing strategies and tactics	1.1. Brief ***stakeholders*** who participated in the ***marketing*** planning process on their implementation roles and responsibilities 1.2. Identify and brief marketing and ***non-marketing personnel*** critical to the success of the marketing plan, on the objectives of the plan, performance measures, and their roles and responsibilities 1.3. Prioritise marketing strategies and identify ***resources*** for their implementation, in accordance with organisational requirements 1.4. Implement communication and team building strategies to ensure that personnel responsible for each element of the ***marketing mix*** work together to meet the organisation's marketing objectives 1.5. Implement strategies for monitoring marketing activities and analysing marketing performance, in

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ELEMENT	PERFORMANCE CRITERIA
	accordance with the marketing plan
2. Monitor marketing strategies and tactics	2.1. Monitor and implement promotional activity against communication objectives in the marketing plan 2.2. Monitor product, pricing and distribution decisions against organisational policy and the objectives of the marketing plan 2.3. Monitor marketing results against targets in the marketing plan 2.4. Monitor marketing revenue and costs against budget, and analyse record variations 2.5. Prepare and present marketing reports that indicate ongoing progress towards marketing objectives
3. Evaluate and improve marketing performance	3.1. Regularly assess marketing performance against objectives 3.2. Identify opportunities for improvement through discussion with customers and personnel responsible for each element of the marketing mix 3.3. Change business practices in line with changing customer requirements to maintain business relevance and viability 3.4. Document recommendations for improvement in accordance with organisational requirements 3.5. Communicate changes to marketing objectives and targets with relevant stakeholders, to facilitate implementation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to prepare complex reports on marketing performance
- numeracy skills to analyse marketing performance, revenue and cost
- teamwork skills to manage a marketing team.

Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE

• organisational strategic and marketing objectives, plans and performance measures
• principles of the marketing mix
• key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as:
  • anti-discrimination legislation and principles of equal opportunity, equity, and diversity
  • ethical principles
  • marketing codes of practice and conduct such as the Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice
  • privacy laws
  • Trade Practices Act.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • successfully implementing marketing strategies identified in an organisation's marketing plan • coordinating personnel involved in conducting marketing activities • monitoring, evaluating and reporting on marketing activities against defined objectives • modifying marketing activities in line with new or emerging trends.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to organisational and marketing strategic plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

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EVIDENCE GUIDE	
	• analysis of responses to case studies and scenarios • assessment of written reports on marketing performance • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of team management activities • observation of presentations on marketing performance reports • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Stakeholders may include:	• Board of directors • finance staff • human resources staff • IT staff • managers • marketing personnel • owners • production staff • supervisors
Marketing may include:	• business-to-business marketing • direct marketing

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RANGE STATEMENT	
	• ideas marketing • marketing of goods • public sector marketing • services marketing • telemarketing
Non-marketing personnel may include:	• advertising personnel • managers • public relations personnel • sales manager • sales team • staff • supervisors
Resources may include:	• financial • human • IT • physical • technical

Marketing mix may include:	• distribution
	• level of service
	• pricing
	• product or service variables such as:
	  • design
	  • quality
	  • range
	  • safety features
	  • technical features
	• promotion

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

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Co-requisite units

Co-requisite units		

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BSBMKG515A Conduct a marketing audit

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to prepare for, conduct and report on a marketing audit in accordance with an organisation's marketing plan. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a marketing management role who are required to develop a comprehensive description of the organisation's marketing operations as part of the marketing planning and management auditing process of an organisation. The outcomes of marketing audits generally are used to inform an organisation's marketing plan.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare for a marketing audit	1.1. Identify ***main purposes of the marketing audit*** in accordance with organisational requirements 1.2. Determine scope of the marketing audit and audit methodology in accordance with organisational requirements 1.3. Determine appropriate times when a marketing audit should be undertaken, in accordance with organisational requirements 1.4. Identify participants likely to be involved in carrying out a marketing audit
2. Identify the form of a marketing audit	2.1. Identify main characteristics of a marketing audit in terms of relevance to the task and audit priorities 2.2. Identity main elements to be included in a marketing audit and its format, in accordance with organisational requirements 2.3. Identify various forms of a marketing audit and select those that best meet the requirements of the marketing plan, in accordance with organisational requirements
3. Conduct an external marketing audit	3.1. Identify ***criteria to use in an external marketing audit***, in accordance with organisational

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ELEMENT	PERFORMANCE CRITERIA
	requirements 3.2. Identify and describe in qualitative and quantitative terms ***external environmental factors*** which meet the requirements of the audit process 3.3. Identify and describe in qualitative and quantitative terms the technological factors, market characteristics and competitive factors relating to or affecting the business, which meet audit process requirements
4. Conduct an internal marketing (self) audit	4.1. Identify ***criteria to use in an internal marketing audit*** in accordance with organisational requirements 4.2. ***Describe the marketing organisation*** in accordance with organisational and audit requirements 4.3. Describe the ***marketing systems*** in accordance with organisational and audit requirements 4.4. Identify the marketing productivity in terms of profitability and cost effectiveness, and record the results in accordance with organisational and audit requirements
5. Prepare a marketing audit report	5.1. Write a marketing audit report in accordance with organisational requirements 5.2. Ensure marketing audit report meets the reporting requirements of the marketing audit form selected 5.3. Ensure marketing audit report meets the requirements of the marketing plan

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people form diverse backgrounds and people with diverse abilities • literacy skills to identify relevant information, and to prepare reports with complex marketing concepts and ideas • research and data collection skills to collect internal and external marketing information.

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge

• elements of marketing planning
• key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as:
  • anti-discrimination legislation
  • occupational health and safety
  • privacylaws
  • Trade Practices Act
• organisational business and marketing plans
• research methodologies and data collection techniques appropriate to the marketing services industry
• types of marketing audits.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • conducting, documenting and reporting on an internal and external audit of an organisation's marketing activities in accordance with organisational reporting requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to appropriate documentation and resources used to conduct marketing audit activities.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following assessment methods are appropriate for this unit: • assessment of written marketing audit reports • direct questioning combined with a review of

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EVIDENCE GUIDE	
	portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of marketing audit reports • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony form team members, colleagues, supervisors or managers.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Main purposes of the marketing audit may include:	• investigating the potential macro- and micro-environmental factors which may affect business and marketing operations • obtaining a comprehensive description of all major marketing activities of the organisation • providing a basis for marketing planning activities

Criteria to use in an external marketing audit may include:	• business and competitor characteristics
	• consumer needs
	• credit availability
	• demographics
	• forecast trends such as:
	  • age
	  • growth
	  • income
	  • regional distribution of population

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RANGE STATEMENT	

	• size
	• general effects that changes in the law and politics may have on the organisation
	• influence of technology on the operations and substitution of products and services on the organisation's business
	• interest rates and cost of capital
	• macro-external environment elements, including:
	  • demographic
	  • economic
	  • ethical
	  • physical/geographic
	  • political/legal
	  • social/cultural
	  • technological
	• material shortages
	• micro-external environment elements, including:
	  • buyer and consumer behaviour
	  • collaborators and alliance partners
	  • competition
	  • market demand
	• product or service usage
	• social and cultural factors
	• unemployment

External environmental factors may include:	• business environmental factors • general economic and demographic environmental factors • political, fiscal and legal environmental factors • social and cultural environmental factors
Criteria to use in an internal marketing audit may include:	• existing research data and marketing information systems • industry sources • internal data such as sales, promotions and product or service development • organisation structures • supply chain management and logistics
Describing the marketing	• functional efficiency • internal interface within the organisation

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RANGE STATEMENT	
organisation may include:	• organisation's formal structure
Marketing systems may include:	• marketing control • marketing information • marketing planning • product, service and concept related systems

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG516B Profile international markets

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to select and confirm an appropriate international market. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for selecting and confirming appropriate international market/s by identifying the target market, profiling the target market and developing a positioning strategy.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Select potential international markets for further investigation	1.1. ***Determine readiness*** to market products or services internationally 1.2. List potential international markets for further investigation 1.3. Identify ***information sources*** to inform process for selection of international markets 1.4. Determine and document ***criteria*** to determine suitability of international markets for product or service 1.5. Access and use information sources to determine suitability of international markets for product or service to be marketed 1.6. Select international markets for profiling
2. Identify the target market	2.1. Evaluate and choose ***approaches*** to determining and describing the total market within selected countries for a product or service 2.2. Define the target market for a product or service in terms of prospective ***users***/***consumers***, the selected market segment/s and cultural appropriateness of the product or service 2.3. Use segment descriptors to describe the target market 2.4. Identify available marketing strategic options and select the ***targeting strategy*** that best meets the

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ELEMENT	PERFORMANCE CRITERIA
	requirements of the marketing plan 2.5. Check the cultural appropriateness of the chosen targeting strategy using available information sources
3. Profile the target audience	3.1. Describe the total and selected market and the selected market segment/s in the form of a consumer profile 3.2. Ensure the consumer profile identifies consumer characteristics in standard ***statistical terms*** and/or the descriptive terms used in media selection 3.3. Use ***demographic data*** and/or ***psychographic descriptions*** in the consumer profile in accordance with the requirements of the marketing plan 3.4. Ensure the profile meets organisational requirements in terms of language, format, content and level of detail
4. Develop a positioning strategy	4.1. Identify available ***positioning strategies*** are and choose a strategy to meet ***marketing requirements*** and the consumer profile including the culture of profiled groups 4.2. Check cultural appropriateness of chosen positioning strategies using available information sources 4.3. Write a positioning implementation plan in accordance with organisational requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to profile international markets, audiences and segments • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • evaluation and assessment skills to investigate international business opportunities • literacy skills to write reports with complex ideas and concepts • research and information-gathering skills to obtain information about prospective international markets, audiences and segments • technology skills to use a range of software to conduct market profiling activities.

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge

• cultural aspects relevant to international markets profiled
• market profiling techniques and related software programs
• organisational requirements for presentation of completed profile
• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • occupational health and safety
  • Privacy Act
  • Trade Practices Act
  • World Trade Organisation determinations
• sources of external and internal information on international markets.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • completed profiles where candidate has documented potential international markets based on established criteria, targeting strategy, profile of international markets, positioning strategies, and checks for cultural appropriateness of products • targeting strategy and positioning strategies which account for cultural differences • knowledge of cultural aspects relevant to international markets profiled.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to evidence of completed profiles • access to relevant sources of information to develop profiles.

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of consumer profiles • analysis of responses to case studies and scenarios • observation of demonstrated international market profiling, targeting and segmentation techniques • observation of presentations on international marketing profiles developed • oral or written questioning to assess knowledge of international markets • assessment of positioning implementation plan.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBMKG517A Analyse consumer behaviour for specific international markets.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Determining readiness may include analysing:	• available financial resources of own organisation • economic conditions within potential international markets • existing competitors • international standards for product or service • knowledge of international laws, conventions and culture • links to and networks within international

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RANGE STATEMENT	
	markets • organisation's experience and capability to market internationally • production capacity and ability to expand capacity as required • research capability

Information sources may include:	• advice from:
	  • academics
	  • chambers of commerce
	  • colleagues who are residents or former residents of chosen countries
	  • industry associations
	  • other private agencies specialising in international trade
	  • professional advisors
	  • senior colleagues
	  • technical experts
	  • training providers
	• government agencies such as Austrade and state/territory government departments
	• professional libraries
	• reference material (paper-based and internet) within organisation
	• trade journals
	• training providers

Criteria may include:	• capabilities, interests and preferences of own organisation
	• economic considerations such as:
	  • economic wealth within selected countries
	  • anticipated cost to provide service or product
	• existing competitors operating within selected country/countries
	• history of product or service provision within selected country/countries
	• relevant international regulations and taxes/duties the product or service would attract
	• trade routes and modes of transport available to destination countries

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RANGE STATEMENT	
Approaches may include:	• identifying consumers with relevant needs • identifying current users of the product or service • identifying people with related characteristics
Consumers may include:	• businesses • government agencies • households • individuals
Targeting strategy may include:	• concentrated, differentiated and mass strategies • differentiation and segmentation • ease of entry • growth considerations • market share • niche markets • price sensitivity • purchasing power • sales volume
Statistical terms may include:	• categories used by the Australian Bureau of Statistics in collecting and reporting census data
Demographic data may include:	• age • children • education • first language • gender • geographic location within country • income • marital status • nationality • occupation
Psychographic descriptions may include:	• activities • interests • lifestyle • opinions • values and attitudes
Positioning strategies may include:	• competitive positioning • conspicuous positioning • image perceptions • market follower positions

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RANGE STATEMENT	
	• market leader positions • me-too positioning • prestige and exclusive positioning • repositioning • service positioning • value positioning
Marketing requirements may include:	• business-to-business marketing • direct marketing • ideas marketing • marketing of goods • public sector marketing • services marketing • telemarketing

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG517A Analyse consumer behaviour for specific international markets

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to analyse consumer behaviour for specific international markets. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for confirming the target market, assessing the current level of consumer interest, and developing and documenting recommended marketing strategies.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Confirm the target market	1.1. Identify the market or market segment for a product or service in accordance with the marketing plan 1.2. Identify ***aspects of culture*** that may have an impact on international marketing of products or services within target market 1.3. Identify consumer attributes for the market or market segment from the market profile 1.4. Identify features of the products or services in accordance with the marketing plan
2. Assess current level of consumer interest	2.1. Investigate consumer need for the products or services through analysis of trends and past performance of products and services both within Australia and within relevant international settings 2.2. Review past ***marketing***, including plans, strategies and campaigns or positioning of products or services in relation to the effectiveness of its focus of appeal both within Australia and within relevant international settings 2.3. Assess ***individual***, ***social and cultural influences*** on consumer behaviour and estimate their impact for products or services 2.4. Assess ***lifestyle influences*** on consumer behaviour and estimate their impact for products or services 2.5. Assess ***organisational behaviour*** in relation to

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ELEMENT	PERFORMANCE CRITERIA
	products or services in accordance with the marketing plan
3. Recommend marketing strategies	3.1. Ensure marketing strategies address innate and acquired needs of consumers and appeal to the motives that influence decision making 3.2. Present a rationale for the focus of appeal and outline how influences on consumer behaviour and cultural considerations will be used to target effective marketing strategies 3.3. Ensure the focus of appeal meets the ***legal and ethical obligations*** and the budgetary requirements of the marketing plan, and check for ***cultural appropriateness***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to profile international markets, audiences and segments
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- evaluation and assessment skills to analyse consumer behaviour
- literacy skills to write reports with complex ideas and concepts
- research and information-gathering skills to obtain information about prospective international markets, audiences and segments
- technology skills to use a wide range of software.

Required knowledge

- cultural aspects relevant to international markets profiled
- market analysis techniques
- organisational requirements for presentation of completed profile
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - occupational health and safety
  - privacy
  - Trade Practices Act

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REQUIRED SKILLS AND KNOWLEDGE
• World Trade Organisation determinations • software tools to analyse consumer behaviour • sources of external and internal information on international markets.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • completed marketing strategies where candidate has documented process to confirm target market, assessed current level of consumer interest and used this analysis process to document recommended marketing strategies that are culturally appropriate to the selected international markets • knowledge of cultural aspects relevant to international markets profiled.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to completed marketing strategies and other relevant workplace documents • access to information sources used by candidate.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of past marketing • analysis of responses to case studies and scenarios • demonstration of market analysis techniques • observation of demonstrated international market analysis techniques

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EVIDENCE GUIDE	
	• observation of presentations on consumer behaviour characteristics in target international markets • oral or written questioning to assess knowledge of international markets and strategies • assessment of written reports analysing consumer behaviour.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBMKG516BProfile international markets.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Aspects of culture may include:	• attitude of overseas countries to Australia and Australians • degree of fiscal conservatism or liberalism within culture • family structures, and usual purchasers and decision makers in families • religion • values and beliefs
Marketing may include:	• business-to-business marketing • direct marketing • e-business • ideas marketing • marketing of goods • public sector marketing • services marketing • telemarketing
Individual influences may include:	• attitudes • beliefs

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RANGE STATEMENT	
	• learning • past experience • perception • personality • self-image • values
Social and cultural influences may include:	• culture • family background • family decision maker/s • social class • socioeconomic factors
Lifestyle influences may include:	• aspirations • interests • leisure activities
Organisational behaviour may include:	• contract buying • group decision making • modified re-purchase • new purchases • re-purchase
Legal and ethical obligations may include:	• Australian, international and local context of legal and ethical obligations • codes of practice • cultural expectations and influences • ethical principles • legislation • policies and guidelines • regulations • social responsibilities such as protection of children and environmental issues • societal expectations
Cultural appropriateness may include:	• appropriateness of service or product in relation to the culture of countries selected for marketing

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG518A Plan and implement services marketing

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to use a range of strategies to plan and implement the marketing of services. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a marketing supervisory or management role within a marketing team responsible for the marketing of services. They may work in small, medium or large enterprises and in a variety of industries, including service industries. The services to be marketed could be professional services, services to consumers and business customers, and services linked to tangible products. The unit reflects the fact that the marketing of services differs from the marketing of goods; and that services have distinctive characteristics with implications for a strategy.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify strategies for the marketing of services	1.1. Research ***services*** and their ***characteristics*** in a specific industry context 1.2. Identify ***marketing mix as it applies to services*** 1.3. Evaluate consumer behaviour in services and implications for marketing strategies 1.4. Identify ***factors*** influencing customer satisfaction with services 1.5. Identify range of ***strategies to market the service*** appropriate for the organisation
2. Select strategies for the marketing of services	2.1. Analyse ***market trends*** for service delivery and identify opportunities to market the services 2.2. Identify previous service marketing strategies in the organisation, and analyse successful strategies and areas for improvement 2.3. Select most appropriate service marketing strategies and ***activities*** which fit with the organisation's strategic and marketing plans

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ELEMENT	PERFORMANCE CRITERIA
3. Plan and develop activities for marketing of services	3.1. Record service marketing objectives and purpose 3.2. Calculate costs of service marketing activities 3.3. Select methods to report and measure effectiveness of service marketing activities 3.4. Develop effective ***service level agreements*** 3.5. Assign responsibilities to team members for service marketing activities 3.6. Record the strategy plan for the marketing of services marketing and present to relevant stakeholders 3.7. Assemble required resources to implement the service marketing plan
4. Implement and monitor marketing strategy for services	4.1. Schedule work on each services marketing campaign element according to lead times required for different media, and marketing plan for services 4.2. Brief staff and suppliers on their budgets, time lines, roles and responsibilities, and legal and ethical requirements 4.3. Implement service marketing activities according to marketing plan for services 4.4. Identify and use evaluation criteria and ***evaluation methods*** to determine effectiveness of marketing, and make required modifications 4.5. Analyse success indictors of marketing campaign and record performance according to organisational reporting requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• creativity and innovation skills to identify new opportunities for marketing of services
• learning and analytical skills to:
  • evaluate effectiveness of services marketing
  • apply this learning to contribute to the organisation's outcomes

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REQUIRED SKILLS AND KNOWLEDGE

• literacy skills to write reports with complex concepts and ideas
• numeracy skills to:
  • calculate costs of service marketing activities
  • set marketing budgets
• planning and organising skills to schedule the marketing strategy
• research skills to research trends, customer requirements and appropriate strategies for marketing
• verbal communication skills to present strategies to relevant personnel

Required knowledge
• aspects of consumer behaviour specific to services marketing • components of a service guarantee • marketing mix as it applies to services • methods of measuring effectiveness of marketing activities • range of marketing strategies appropriate for services • range of services and their characteristics • special aspects of consumer behaviour in services marketing • trends in service delivery and marketing

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• development of a services marketing plan providing information on the:
	  • objectives of the plan
	  • type of service marketing strategies and activities to be undertaken
	  • budget
	  • methods to measure effectiveness
	  • responsibilities
	• analysis of an implemented services marketing strategy.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure access to: • a workplace or simulated work environment • office equipment and resources • relevant organisational documentation.
Method of assessment	The following assessment methods are appropriate for this unit: • analysis of responses to case studies and scenarios • review of a portfolio of evidence documenting research, planning and implementation of a services marketing plan • oral or written questioning around aspects of services marketing • assessment of reports.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Services may include:	• financial • health care • hospitality • logistical • personal • professional • social • travel • utility.
Characteristics may include:	• challenges with evaluation • heterogeneity • high involvement and personal nature • importance of time factor • intangibility

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RANGE STATEMENT	
	• lack of customer ownership • lack of inventories • perishability • simultaneous production and consumption • use of different distribution channels • variability of service encounters.
Marketing mix as it applies to services may include:	• people • physical evidence • place • price • processes • product • promotion.
Factors may include:	• attributions for service success or failure • consumer emotions • other consumers • personal factors • price • quality of service • service features.
Strategies to market the service may include:	• building reputation • customer relationship management (CRM) • distribution systems • internet marketing • pricing strategies • promotional program, e.g. advertising, displaying results of using service, indirect promotion • relationship marketing • service blueprinting • service encounters - social and physical elements • service quality.
Market trends may include:	• changing demographics • growing culture of convenience • growth of information society • increased foreign competition • increased internal competition • outsourcing non-core functions • reduced government regulation • technology changes.

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RANGE STATEMENT	
Activities may include:	• adjusting pricing to influence demand • advertising through a range of media • instituting total quality management programs • offering service guarantees • providing tangibility through physical appearance of the facility • training employees on service provision.
Service level agreements may include:	• customer duties • disaster recovery • performance measurement • problem management • termination of agreement • warranties.
Evaluation methods may include:	• customer focus groups • post-transaction surveys • relationship surveys • research on lost customers • review of customer complaints.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business development - marketing

Co-requisite units

Co-requisite units		

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BSBMKG519A Plan and implement business-to-business marketing

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan and implement business-to-business (B2B) marketing. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a marketing supervisory or management role within a marketing team responsible for business-to-business marketing. They may work in small, medium or large enterprises and in a variety of industries. The unit reflects the fact that business-to-business marketing differs from consumer marketing; and that business markets have distinctive characteristics with implications for a strategy.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify and evaluate business-to-business marketing strategies	1.1. Identify ***business-to-business markets*** in an industry context 1.2. Research ***characteristics of business markets*** in an industry context 1.3. Identify and analyse ***factors influencing business buyers*** in an industry context 1.4. Analyse the ***business buying process*** and its implications in the industry context 1.5. Research and analyse a range of ***business-to-business marketing strategies*** appropriate for an organisation 1.6. Identify ***key personnel in the buying decision process*** in the organisation's business markets
2. Select business-to-business marketing strategies	2.1. Analyse trends for business markets and identify business-to-business marketing opportunities for the organisation 2.2. Identify and analyse the success of the organisation's previous business-to-business marketing strategies 2.3. Select most appropriate business-to-business marketing strategies and activities that fit with the organisation's strategic and marketing plans
3. Plan and develop business-to-business	3.1. Record business-to-business marketing objectives and purpose

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ELEMENT	PERFORMANCE CRITERIA
marketing activities	3.2. Calculate costs of business-to-business marketing activities with assistance of ***appropriate personnel*** 3.3. Select methods to report and measure effectiveness of business-to-business marketing activities 3.4. Assign responsibilities to team members for business-to-business marketing activities 3.5. Record the business-to-business marketing plan and present to relevant stakeholders 3.6. Assemble required resources to implement the business-to-business marketing plan
4. Implement and monitor business-to-business marketing plan	4.1. Schedule work on each business-to-business marketing campaign element, according to lead times required and marketing plan 4.2. Brief staff and suppliers on their budgets, time lines, roles and responsibilities, and legal and ethical requirements 4.3. Plan implementation of business-to-business marketing activities according to marketing plan 4.4. Identify and use evaluation criteria and ***evaluation methods*** to determine effectiveness of marketing plan 4.5. Analyse success indictors of business-to-business marketing plan and record performance according to organisational reporting requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- creativity and innovation skills to identify new business-to-business marketing opportunities
- learning and analytical skills to:
  - evaluate effectiveness of business-to-business marketing
  - use this learning to contribute to operational outcomes
- literacy skills to produce reports with complex concepts and ideas
- numeracy skills to set marketing budgets
- research skills to research trends, customer requirements, and appropriate strategies

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REQUIRED SKILLS AND KNOWLEDGE
for business-to-business marketing • teamwork skills to involve relevant personnel in business-to-business marketing
Required knowledge
• business buying processes • characteristics of business markets compared to consumer markets • factors influencing business buyers • range of strategies for business-to-business marketing • trends in business-to-business marketing

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• development of a business-to-business marketing plan providing information on the:
	  • objectives of the business-to-business marketing strategy
	  • business-to-business marketing strategies and activities to be undertaken
	  • budget
	  • methods of measuring effectiveness
	  • responsibilities
	• implementation of a business-to-business marketing plan.

Context of and specific resources for assessment	Assessment must ensure access to: • a workplace or simulated work environment • office equipment and resources • relevant organisational documentation.
Method of assessment	The following assessment methodsare appropriate for this unit: • analysis of responses to case studies and scenarios • review of a portfolio of evidence documenting research, planning and implementation of a business-to-business

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EVIDENCE GUIDE	
	marketing strategy • oral or written questioning around aspects of business-to-business marketing • observation of presentation of reports to relevant personnel • assessment of reports.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Business-to-business markets may include:	• government markets • industrial markets • institutional and not-for-profit markets • retail and wholesale markets • service markets.

Characteristics of business markets may include:	• market structure and demand, such as:
	  • close supplier-customer relationships
	  • derived demand from the demand for consumer products and services
	  • fewer buyers than in consumer markets
	  • fluctuating demand
	  • geographically concentrated buyers
	  • inelastic demand
	  • larger buyers than in consumer markets
	• nature of buying unit, such as:
	  • professional purchasing and procurement officers
	  • several buying influences, e.g. buying committees
	• types of decisions and the decision process, such as:
	  • buying process more formalised
	  • complex decisions

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RANGE STATEMENT	
	• more direct purchasing • some leasing rather than buying.
Factors influencing business buyers may include:	• environmental factors • organisational factors • interpersonal factors of people involved in the decision • individual factors of people involved in the decision • type of buying situation.
Business buying process may include:	• general need description • information and supplier search • order-routine specification • post-purchase performance review • problem recognition • product specification • proposal solicitation • supplier selection.

Business-to-business marketing strategies may include:	• cultivating long-term customers through such things as:
	  • assigning highly trained sales people to key accounts
	  • loyalty programs
	  • personal selling
	  • relationships management
	• development of long-term partnering arrangements
	• engaging in marketing efforts to encourage the sale of the business buyers' products
	• introducing innovative products and services that add value
	• monitoring the performance of sales channels and partnerships and focusing on most profitable channels
	• responding to requests for proposals (RFPs)
	• targeting brand messages to both buyers and influencers
	• using new technologies for e-business.

Key personnel in the buying decision process may include:	• finance manager • people who will use the product or service • personnel with formal authority to select the suppliers and arrange terms of purchase • personnel with power to approve final suppliers • technical personnel.
Appropriate personnel may include:	• accountant • finance manager.

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RANGE STATEMENT	
Evaluation methods may include:	• customer focus groups • lost customer research • post-transaction surveys • relationship surveys • review of customer complaints.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business development - marketing

Co-requisite units

Co-requisite units		

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BSBMKG520A Manage compliance within the marketing legislative framework

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to comply with the marketing legislative framework, and use this framework for competitive advantage. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a marketing supervisory or management role within a marketing team. They may work in small, medium or large enterprises and in a variety of industries. Within their role they will be required to understand the legal environment in which marketing decisions are made in the organisation so that the organisation can avoid litigation, as well as use the legislative framework to assist marketing strategies. Individuals in these roles will need to competently discuss legal issues with specialists, but will not be making legal decisions independently.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify and interpret the legislative framework relating to marketing	1.1. Identify and locate current information about ***legislation*** as it relates to marketing decision making in the industry context 1.2. Identify ***codes of practice*** as they relate to marketing, and analyse their implications for the industry context 1.3. Analyse how legislation relating to marketing can protect and assist the trader, consumer and competitive process 1.4. Identify ***sources of information and advice*** about the legislative framework relating to marketing, and analyse them for usefulness in the industry context
2. Promote a culture of compliance with the	2.1. Identify ***benefits*** and essential components of the legal compliance program relating to marketing, and

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ELEMENT	PERFORMANCE CRITERIA
legislative framework relating to marketing	how they fit with the whole of organisation compliance program 2.2. Participate in a marketing compliance audit and make recommendations to address identified gaps 2.3. Identify possible ***implications of non-compliance*** and use them to recommend changes to practice 2.4. Design a training program to educate staff on compliance as it relates to marketing
3. Recommend strategies to use the legislative framework relating to marketing for competitive advantage	3.1. Identify and analyse a range of ***methods to protect*** the organisation's products and services being marketed against intellectual property breaches 3.2. Make recommendations on strategies for protection of intellectual property rights and present to key stakeholders 3.3. Make recommendations to implement systems to identify intellectual property infringement by ***third parties*** 3.4. Identify remedies for own and other organisations' breaches of marketing legislation which could have an impact on the organisation 3.5. Access and effectively use others' intellectual property within legal guidelines for business advantage

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to interpret how legislation around marketing could impact on the business
- initiative and enterprise skills to identify opportunities to use the legislative framework for competitive advantage
- learning skills to design training programs that are suitable for a range of people with different learning styles
- literacy skills to produce complex reports and recommendations around compliance
- research skills to:

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REQUIRED SKILLS AND KNOWLEDGE

- locate legislation and codes of practice relating to marketing
- participate in a compliance audit
- technology skills to research the legislative framework
- verbal communication skills to:
  - negotiate with legal advisers
  - train staff on compliance

Required knowledge

- components of a compliance program and compliance audit
- different methods to protect intellectual property
- key provisions of legislation as it relates to marketing, including:
  - door-to-door sales legislation
  - legislation around intellectual property, including:
    - Copyright Act
    - Designs Act
    - passing off
    - Patents Act
    - state or territory Business Names Acts
    - Trade Marks Act
  - lotteries and gaming legislation
  - packaging and labelling legislation
  - sale of goods legislation
  - state or territory competition codes
  - state or territory Fair Trading Acts
  - Therapeutic Goods Act
  - trade measures legislation
- key provisions of codes of practice relating to marketing, including:
  - Australian Association of National Advertisers Code of Ethics
  - Australian Direct Marketing Code of Practice
  - Australian Communications and Media Authority (ACMA) Australian eMarketing Code of Practice
  - Therapeutic Goods Advertising Code
  - individual organisation's marketing codes of practice
- sources of information and advice about marketing law

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification and application of legislation and codes of practice as they relate to marketing • promotion of a culture of compliance with the legislative framework relating to marketing • development of strategies to use the legislative framework for competitive advantage.
Context of and specific resources for assessment	Assessment must ensure access to: • a workplace or simulated work environment • relevant workplace documents • research facilities.
Method of assessment	The following assessment methodsare appropriate for this unit: • review of portfolio of evidence of actions taken to promote a culture of compliance with the legislative framework relating to marketing • oral or written questioning to assess understanding and application of the marketing legislative framework • analysis of responses to case studies and scenarios around issues relating to marketing law • demonstration of training for staff around marketing compliance issues • review of report with recommendations for action for an organisation to ensure compliance with the marketing legislative framework.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Legislation may include:	• door-to-door sales legislation
	• legislation around intellectual property, including:
	  • Copyright Act
	  • Designs Act
	  • passing off
	  • Patents Act
	  • state or territory Business Names Acts
	  • Trade Marks Act
	• lotteries and gaming legislation
	• packaging and labelling legislation
	• sale of goods legislation
	• state or territory competition codes
	• state or territory Fair Trading Acts
	• trade measures legislation.

Codes of practice could include:	• Australian Association of National Advertisers Code of Ethics • Australian Direct Marketing Code of Practice • Australian eMarketing Code of Practice • Therapeutic Goods Advertising Code • individual organisation's marketing codes of practice.
Sources of information and advice could include:	• Attorney-General's Department • Australian Communication and Media Authority • Australian Competition and Consumer Commission (ACCC) • Australian Legal Information Institute (AustLII) • Australian Marketing Institute (AMI) • Commonwealth of Australia Law (ComLaw) • IP Australia • lawyers specialising in intellectual property and marketing • the Marketing Association of Australia and New Zealand (MAANZ).
Benefits may include:	• opportunity to improve marketing performance and competitive advantage

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RANGE STATEMENT	
	• incentive to make positive marketing decisions rather than reactive and risky decisions • assisting organisation to become a good corporate citizen • preventing damage to reputation • preventing consequences of breaking the law, such as penalties and costs.
Implications of non-compliance may include:	• loss of reputation • monetary and criminal penalties • cost of legal advice • liability for damages • diversion of resources away from core business activities • negative effect on staffing.
Methods to protect could include:	• copyright • patents • registration of designs • trade marks.
Third parties could include:	• competitors • suppliers.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business development - marketing

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBMKG521A Plan and implement sponsorship and event marketing

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan and implement sponsorships and events to attract and involve a brand's target audience, for brand publicity and association, or other marketing communication objectives. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a marketing management role who are responsible for planning and implementing sponsorships and events in order to increase brand involvement. They may work individually or be responsible for managing a team to develop and implement the plan in small, medium or large enterprises and in a variety of industries.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Investigate sponsorship and event marketing opportunities	1.1. Research and identify ***sponsorship*** and ***event marketing*** opportunities 1.2. Analyse ***advantages*** and ***disadvantages*** of a range of sponsorships and events 1.3. Identify target audience for potential sponsorship and event marketing and analyse motivation 1.4. Identify ***legal***, ***cultural and ethical requirements*** related to sponsorship and event marketing 1.5. Use a range of ***criteria*** to select sponsorships and events which would be effective for marketing to the target audience
2. Plan sponsorship and event marketing	2.1. Develop and record ***objectives and purpose*** of sponsorship and event marketing 2.2. Analyse and record how sponsorships and events fit with other marketing strategies and business objectives 2.3. Calculate costs of chosen sponsorships and events and establish a budget 2.4. Plan time lines for implementation and continuation of the sponsorships and events 2.5. Produce and present a sponsorship and event

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ELEMENT	PERFORMANCE CRITERIA
	marketing proposal in a format appropriate to the organisation
3. Initiate the implementation of sponsorships and events	3.1. Initiate negotiations required to proceed with the sponsorships and events 3.2. Draft contracts for the sponsorships and events under the guidance of ***relevant experts*** 3.3. Assemble required resources to implement sponsorship and event marketing 3.4. Brief key staff on their required input to the sponsorships and events and schedule work
4. Monitor and evaluate sponsorships and events	4.1. Identify and use ***evaluation criteria*** to determine effectiveness of the sponsorships and events marketing arrangements 4.2. Develop a range of ***methods*** to evaluate effectiveness 4.3. Recommend modifications to the sponsorship and event marketing arrangements in line with evaluation 4.4. Record improvement opportunities that arise from the evaluation to be used for current and future sponsorship and event marketing plans

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - brief relevant staff
  - negotiate sponsorships and contracts
- critical thinking skills to analyse advantages and disadvantages of various sponsorship and event marketing opportunities
- learning and analytical skills to:
  - evaluate effectiveness of chosen marketing sponsorships and events
  - use this learning to contribute to organisational outcomes
- literacy skills to write:
  - detailed planning documents

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REQUIRED SKILLS AND KNOWLEDGE
• contract drafts • reports to stakeholders • numeracy skills to establish budgets for sponsorships and events • planning and organising skills to plan sponsorships and events • research skills to identify suitable sponsorship and event marketing opportunities
Required knowledge

• different sponsorships and events suitable for marketing in own context
• methods of evaluating effectiveness of sponsorship and event marketing strategies
• provisions of relevant legislation, codes of practice and national standards that may affect aspects of sponsorship and event marketing, such as:
  • Alcohol Beverages Advertising Code
  • anti-discrimination
  • broadcasting regulations
  • consumer protection
  • contract law
  • insurances
  • intellectual property
  • OHS
  • permissions and permits
  • privacy laws
  • Trade Practices Act
  • voluntary codes of practice, such as Australian Association of National Advertisers (AANA) Advertiser Code of Ethics
• sources of advice available for contract requirements for sponsorship and event marketing

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential: • development of a recorded sponsorship and event marketing plan

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EVIDENCE GUIDE	
competency in this unit	which includes: • objectives and purpose of the sponsorship and event marketing strategy • rationale for choice of particular sponsorships and events • budget • plan for implementation • methods to measure effectiveness • initiation of the implementation of at least one sponsorship and one event for marketing in line with the plan, including draft contracts and evidence of negotiations • evaluation of sponsorship and event marketing strategy.
Context of and specific resources for assessment	Assessment must ensure access to: • a workplace or simulated work environment • relevant workplace documents and data • office equipment and resources.
Method of assessment	The following assessment methodsare appropriate for this unit: • review of portfolio of evidence of actions taken to produce a sponsorship and event marketing plan • analysis of responses to case studies and scenarios around sponsorship and event marketing • observation of negotiation required for sponsorships and events • oral or written questioning to assess knowledge of sponsorship and events marketing strategies and options, and the legal and ethical framework related to sponsorships and events for marketing.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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RANGE STATEMENT	

Sponsorship:	• may include financial or in-kind support in exchange for brand publicity and association, or other marketing communication objectives
	• could be for:
	  • a cause
	  • a person
	  • a team
	  • an activity
	  • an organisation.

Event marketing may include:	• promotional occasions designed to attract and involve a brand's target audience, and could involve events:
	  • created by organisation, e.g. anniversaries, grand openings, new-product introductions, corporate annual meetings
	  • participated in by the organisation, e.g. trade shows
	  • sponsored by the organisation, e.g. sporting events.

Advantages may include:	• building relationships and goodwill
	• creating opportunities for:
	  • cross-selling
	  • extendibility beyond the publicity directly provided by the event or sponsorship
	  • hosting important clients and other stakeholders
	• enhancing brand visibility by associating it with something positive.

Disadvantages may include:	• difficulty in calculating return on investment
	• effect on brand if the event or person being sponsored is involved in bad publicity
	• lack of control over the design and management of a sponsored event
	• only involving a small percentage of brand's target audience
	• other sponsors being involved that are:
	  • in competition
	  • not consistent with the ethos of the organisation.

Legal, ***cultural and ethical requirements*** may include:	• Alcohol Beverages Advertising Code • anti-discrimination legislation • broadcasting regulations • consumer protection • contract law • ethical principles

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RANGE STATEMENT	
	• insurances • intellectual property legislation • OHS legislation • permissions and permits • privacy laws • social values • Trade Practices Act • voluntary codes of practice, such as Australian Association of National Advertisers (AANA) Advertiser Code of Ethics.
Criteria may include:	• how further exposure and positive associations can be gained • how it can be linked with other marketing communications • what the organisation could do spending the same amount of money on other forms of marketing • whether it is likely to be of interest to customers and prospects • whether it is relevant • whether the association is right for the product or brand.
Objectives and purpose may include:	• increase brand awareness • provide a platform for brand publicity • reach hard-to-reach target audience.
Relevant experts may include:	• lawyers specialising in sponsorship • legal team within organisation.
Evaluation criteria may include:	• comparison of effect with other forms of marketing • differentiation of brand • extent of audience engagement • extent of brand impact • whether value has been added to brand.
Methods may include:	• focus groups • interviews at the event • surveys, pre- and post-event.

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Business development - marketing

Co-requisite units

Co-requisite units		

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BSBMKG522A Plan measurement of marketing effectiveness

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify, plan and promote a strategy to measure the effectiveness of marketing activities using a range of marketing metrics. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a marketing operations or supervisory role within a marketing team responsible for the use and reporting on measurements of marketing effectiveness. They may work in small, medium or large enterprises and in a variety of industries.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify and analyse measurement of marketing effectiveness	1.1. Research a range of ***metrics*** available to identify the effectiveness of ***marketing processes and functions*** 1.2. Identify marketing metrics used by the organisation in each key marketing operation 1.3. Identify how existing marketing metrics link to organisational strategy and objectives, and opportunities to improve the links 1.4. Analyse the effectiveness of current and possible future marketing metrics 1.5. Identify ***issues*** with the use of marketing metrics within the organisation
2. Develop the strategy to measure marketing effectiveness	2.1. Identify the organisation's ***criteria*** for selecting manageable and cost-effective metrics 2.2. Identify the organisation's objectives for the measurement and evaluation of marketing effectiveness 2.3. Recommend methods of measuring marketing performance for each marketing process or function tailored to the organisation's brand or unique positioning 2.4. Contribute to the calculation of costs of gathering and analysing data 2.5. Plan and document the implementation strategy for

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ELEMENT	PERFORMANCE CRITERIA
	measuring and analysing marketing performance 2.6. Contribute to the development of specific, relevant metrics
3. Promote the strategy to measure marketing effectiveness	3.1. Plan the promotion of validity, value and efficacy of marketing metrics to key stakeholders using appropriate format 3.2. Design an internal marketing communications strategy so that marketing and other relevant personnel fully understand their role in measuring marketing effectiveness 3.3. Report on implementation and outcome issues

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - promote the strategy to measure marketing effectiveness
  - write and present complex reports
- learning and research skills to:
  - research available metrics
  - design a communication strategy suitable for a range of people with different learning styles
- numeracy skills to:
  - analyse marketing data
  - calculate costs of collecting and analysing data
  - select appropriate metrics
- planning and organising skills to design implementation of the strategy to measure marketing effectiveness
- technology skills for research and data analysis

Required knowledge

- range of criteria for selecting metrics
- range of marketing functions within an organisation
- range of marketing metrics and their usefulness to measure key marketing operations

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• development of a strategy to measure marketing performance, which includes:
	  • objectives
	  • metrics chosen and rationale for choice for each marketing process or function
	  • costs
	  • link to organisational strategy and objectives
	  • communication plan.

Context of and specific resources for assessment	Assessment must ensure access to: • a workplace or simulated work environment • relevant workplace documents and data, in particular data already collected to measure marketing effectiveness • office equipment and resources, including appropriate software.

Method of assessment	The following assessment methods are appropriate for this unit:
	• review of portfolio of evidence of actions taken to plan a strategy to measure marketing performance
	• oral or written questioning to assess:
	  • actions taken to implement a strategy to measure marketing performance
	  • knowledge of marketing metrics and their uses for different phases of the marketing process and for different marketing outcomes
	• analysis of responses to case studies and scenarios around marketing metrics.

Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Metrics may include:	• brand equity, such as:
	  • availability
	  • brand perception
	  • familiarity
	  • loyalty
	  • penetration
	• brand value
	• competition
	• customer databases
	• customer acquisition, satisfaction, retention, value and loss
	• communications effectiveness
	• e-metrics, such as:
	  • hits
	  • page views
	  • visits
	• inventory efficiency and effectiveness
	• loyalty or retention
	• market performance by customer, product, accounting and financial outcomes
	• market share
	• overall sales
	• return on marketing investment in market-based assets
	• sales force effectiveness
	• segment penetration
	• share of mind
	• share of voice
	• share of wallet
	• shareholder value.

Marketing processes and functions may include:	• advertising • direct marketing • distribution

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RANGE STATEMENT	
	• e-marketing • loyalty programs • market research • marketing communications • pricing • product development, including pre- and post-launch • sales force.
Issues may include:	• cost of obtaining meaningful information • frequency of measurement • level of management that reviews the metrics • skill of marketing personnel in terms of measurement • treatment of intangible assets in financial statements • volume of data to be analysed.

Criteria may include:	• whether they are:
	  • precise and sensitive to change
	  • predictive, e.g. of future customer purchase, retention and cash flow
	  • relevant to the organisation's strategy and context
	  • reliable over time so trends can be tracked
	  • cost-effective
	• costs (money and time) involved in measuring
	• possible benefits of measurement
	• risks if measurement does not occur.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business development - marketing

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Co-requisite units

Co-requisite units		

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BSBMKG523A Design and develop an integrated marketing communication plan

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify and evaluate the range of marketing communication options and media, to design an integrated marketing communication plan, and to develop a marketing communication brief and creative brief that reflect client needs and preferences. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a supervisory or management marketing or advertising role within a marketing or advertising team or media organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Determine marketing communication requirements	1.1. Confirm ***marketing communication purpose*** and objectives with the client 1.2. Obtain comprehensive ***client and product information*** 1.3. Review outcomes of previous marketing communication with the client 1.4. Confirm budget allocation with the client
2. Develop a marketing communication brief	2.1. Develop a brief, ensuring it contains a client profile, purpose statement and objectives that reflect client needs 2.2. State ***marketing communication objectives*** in measurable terms and provide specific guidelines on what is to be accomplished by the marketing communication 2.3. Define key characteristics, competitive factors and the market situation facing the product or service 2.4. Include a summary of ***information on the target audience***, and ***legal and ethical constraints***
3. Design the integrated marketing communication strategy	3.1. Select ***marketing communication options*** appropriate for the marketing communication brief 3.2. Critically analyse the advantages and disadvantages of each marketing communications variable and ***media vehicles*** for the product or service

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ELEMENT	PERFORMANCE CRITERIA
	3.3. Determine ***media characteristics*** that match the requirements of the brief 3.4. Analyse media consumption habits for primary and supplementary marketing media among target audiences 3.5. Evaluate media styles as they relate to brand character of the product or service being marketed 3.6. Compare the ***advantages*** and ***disadvantages of selecting multiple media*** in a media plan 3.7. Develop and apply ***criteria*** for selecting multiple media combinations
4. Select and recommend media for the marketing strategy	4.1. Select media vehicles that match the requirements of the marketing brief for the product or service 4.2. Recommend primary and secondary marketing media that meet target audience preferences 4.3. Ensure recommended media meet the brief, client's requirements, and legal and ethical constraints
5. Develop a creative brief	5.1. Identify ***creative content*** for the chosen media using consumer language in the brief 5.2. Identify ***pitch or appeal*** for the product or service in the brief that meets client requirements 5.3. Identify ***supporting information*** required for consumer understanding of the product or service in the brief 5.4. Ensure that budget for creative work, consistent with the overall marketing budget, is contained in the brief 5.5. Incorporate a deadline for creative work that is consistent with the overall media schedule in the brief

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to question, clarify and report when creating marketing and creative briefs

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REQUIRED SKILLS AND KNOWLEDGE

• learning skills to evaluate and learn from previous marketing communication to contribute to the marketing communication plan
• literacy skills to:
  • read and interpret marketing briefs
  • write reports with complex concepts and ideas
• numeracy skills to develop budgets
• organisational and time-management skills to sequence tasks and meet timelines
• research and data-collection skills to evaluate the suitability of media to the product or service, and brand and marketing objectives
• technology skills to use a wide range of office equipment and software to create a marketing brief

Required knowledge

• economic, social and industry trends relevant to the choice of appropriate media options
• industry products or services in order to recommend appropriate media options
• overview knowledge to identify key provisions of relevant legislation, codes of practice and national standards that affect business operations as they relate to marketing, such as:
  • anti-discrimination legislation
  • consumer protection laws
  • copyright legislation
  • ethical principles
  • fair trading laws
  • privacy laws
  • Trade Practices Act
• principles of consumer behaviour and influences on buyer behaviour
• range of marketing communication options for different markets
• range of media vehicles for marketing communication options

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• production of an integrated strategic marketing communication plan for presentation to a client which includes:
	  • purpose statement
	  • definition of the target audience
	  • analysis of the product or service
	  • legal and ethical constraints
	  • marketing communication functions and media vehicles chosen, with rationale for each
	  • creative brief for the media options
	  • schedule for the creative work
	  • budgetary allocation for each media vehicle.

Context of and specific resources for assessment	Assessment must ensure access to: • a workplace or simulated work environment • office equipment and resources • required documentation, including marketing brief.
Method of assessment	The following assessment methods are appropriate for this unit: • review of portfolio of evidence of actions taken to produce a strategic marketing communication plan • assessment of documented strategic marketing communication plan • oral or written questioning to assess actions taken to produce the marketing communication plan • analysis of responses to case studies and scenarios.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBADV507B Develop a media plan.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and

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RANGE STATEMENT	
regional contexts) may also be included.	
Marketing communication purpose may include:	• communicating a message to a particular audience • differentiating features or benefits • promoting image • providing information • recruiting staff • retaining customers • stimulating demand for a product or service.
Client and product information may include:	• company and its business policies and practices • company's promotional ethos • competition • distribution channels • existing customers and target market • packaging design • past advertising for the product • price, if any • problems and opportunities facing the product • product name and characteristics.
Marketing communication objectives may include:	• improve sales performance and/or profit • launch or re-launch a product or service • maintain or improve market share • maintain or increase awareness of a product or service • test a product or service.
Information on the target audience may include:	• attitudes • cultural factors • demographics • existing product usage • lifestyle • social factors • values.

Legal and ethical constraints may include:	• codes of practice, such as those issued by:
	  • Advertising Federation of Australia
	  • Australian Communications and Media Authority
	  • Australian Competition and Consumer Commission
	  • Australasian Performing Right Association
	  • Commercial Radio Australia
	  • Free TV Australia
	• cultural expectations and influences
	• ethical principles

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RANGE STATEMENT	

	• legislation, for example:
	  • anti-discrimination legislation
	  • consumer protection laws
	  • copyright legislation
	  • ethical principles
	  • fair trading laws
	  • privacy laws
	  • Trade Practices Act
	• policies and guidelines
	• regulations
	• social responsibilities, such as protection of children and environmentally sustainable practices
	• societal expectations.

Marketing communication options may include:	• advertising • customer service • direct marketing • events and sponsorships • packaging • personal selling • publicity and public relations • sales promotion.

Media vehicles may include:	• aerial advertising
	• billboards and posters
	• cable and satellite television
	• cinema
	• direct mail
	• direct response
	• email marketing
	• exhibitions and trade fairs
	• internet
	• magazines
	• new media, including multimedia and hypermedia, such as:
	  • streaming video and audio
	  • 3-D virtual reality environments and effects
	  • highly interactive user interfaces
	  • mobile presentation
	  • use of high-bandwidth
	  • CD and DVD media

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RANGE STATEMENT	
	• telephone and digital data integration • online communities • microdevices • live internet broadcasting • person-to-person visual communication • one-to-many visual communication • newspapers • outdoor • personal selling • podcasting • point of sale • radio • sales literature • sales promotion • sponsorship • television • telemarketing • transit media, such as bus sides and taxi backs • video, video games and videotext.
Media characteristics may include:	• level of audience involvement • level of audience receptiveness • motion effects • proximity to purchase • sound effects • visual effects • whether the target audience responds actively • whether the target audience responds passively.
Advantages of selecting multiple media may include:	• increasing the frequency of the advertising message • increasing the reach of the advertising message.
Disadvantages of selecting multiple media may include:	• duplication of impact • duplication of resources • increasing the cost of marketing.
Criteria may include:	• whether frequency will be increased • whether reach will be increased • cost • avoidance of 'zipping and zapping'.
Creative content may	• brand or image factors

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RANGE STATEMENT	
include:	• colour • features of the product or service.

Pitch or appeal may include:	• key benefits promised to the audience by the advertiser, which may be:
	  • emotional
	  • need-arousing
	  • need-satisfying
	  • negative
	  • positive
	  • rational.

Supporting information may include:	• evidence to support the claimed benefit • purchasing information • reassurance for existing users • requirement to specify the target audience.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business development - marketing

Co-requisite units

Co-requisite units		

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BSBMKG603B Manage the marketing process

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to strategically manage the marketing process and marketing personnel within an organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to senior marketing professionals who are responsible for managing the overall marketing process of an organisation and for managing marketing personnel. Typically they would manage a portfolio of products or services across the organisation, rather than a single product or few products. This unit targets more senior personnel who have a wider scope of marketing activities for a greater number of products or services, than BSBMKG514A Implement and monitor marketing activities.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Manage marketing performance	1.1. Manage marketing effort to ensure it is directed towards areas of greatest potential for the organisation 1.2. Manage integration of marketing, promotional and sales activities in accordance with strategic marketing objectives 1.3. Monitor product, distribution, pricing and marketing communication policies in relation to market changes, marketing plan objectives and organisational requirements 1.4. Use marketing metrics and monitor overall marketing progress against performance targets to ensure activity, quality, cost, and time requirements are met
2. Manage marketing personnel	2.1. Communicate strategic marketing objectives across the organisation in ways suited to levels of knowledge, experience and specific needs of

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ELEMENT	PERFORMANCE CRITERIA
	personnel 2.2. Identify and agree roles, responsibilities and accountabilities of staff and contractors involved in all elements of marketing effort 2.3. Develop communication strategy to ensure that personnel responsible for each element of the ***marketing mix*** work together to meet organisation's marketing objectives 2.4. Provide mentoring, coaching and feedback to support individuals and teams to achieve agreed objectives and to use resources to the required standard 2.5. Identify individual and team performance, and instigate corrective action promptly to safeguard marketing outcomes
3. Evaluate and improve strategic marketing performance	3.1. Analyse marketing outcomes, review strategic objectives and marketing metrics, and revise if required 3.2. Analyse successes and performance gaps in relation to cause and effect, and use this information to improve strategic performance 3.3. Analyse over-performance against targets for trends and set new targets 3.4. Analyse changes in market phenomena, and identify and document their impact on strategic marketing objectives 3.5. Document review of marketing performance against key performance indicators in accordance with organisational requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to consult with marketing managers, supervisors, and workgroup members • innovation and creativity skills to revise strategies so that marketing objectives are met and exceeded

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REQUIRED SKILLS AND KNOWLEDGE
• leadership and teamwork skills to effectively lead and manage marketing team members in an organisation • literacy skills to identify strategic information and to write in a range of styles for different audiences • numeracy skills to analyse data.
Required knowledge

• key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as:
  • anti-discrimination legislation and principles of equal opportunity, equity, and diversity
  • Australian Direct Marketing Association (ADMA) Direct MarketingCode of Practice
  • Australian E-commerce Best Practice Model
  • Australian Government Policy Framework for Consumer Protection in Electronic Commerce
  • confidentiality requirements
  • copyright laws
  • defamation laws
  • Free TV Australia Commercial Television Industry Code of Practice
  • privacy laws
  • sweepstakes regulations
  • Trade Practices Act
• economic, social and industry directions, trends and practices
• organisational structures, roles, responsibilities and policies
• industry product and service knowledge
• principles of marketing, strategic analysis and strategic management
• statistical and data evaluation techniques to measure marketing performance.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • monitoring marketing performance across an organisation by comparing performance against key performance indicators in the marketing plan • effectively communicating marketing objectives to relevant personnel in accordance with organisation requirements • providing feedback, mentoring and coaching to staff, as appropriate • taking action to capitalise on or minimise over- or under-performance against marketing objectives.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on marketing activities and performance against key performance indicators • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations on marketing performance • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other marketing units.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Marketing mix may include:	• distribution
	• level of service
	• pricing
	• promotion
	• product or service variables such as:
	  • design
	  • quality
	  • range
	  • safety features
	  • technical features

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG605B Evaluate international marketing opportunities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to evaluate the international environment, to identify market factors and risks, and to assess the viability of international marketing opportunities. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to senior marketing or management personnel who are required to evaluate the international business environment in preparation for entering an international or export market for the first time, or to identify new marketing opportunities in markets in which their organisation already has a presence. This unit is different to BSBMKG501B Identify and evaluate marketing opportunities, which applies to senior marketing or general managers evaluating domestic marketing opportunities. While the underlying principles of the units are similar, this unit covers the increased complexity of the global business environment, and the cultural differences and international trade agreements to be addressed when conducting business internationally.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Review the global market environment	1.1. Assess international trade patterns and identify their likely importance for the business 1.2. Research ***international business and electronic commerce market factors*** and assess opportunities to enter, shape or influence the market in terms of likely contribution to the business 1.3. Identify international markets operating under free trade or protectionist arrangements and estimate likely ease of entering and trading successfully 1.4. Identify ***international trade policies and agreements*** and estimate their likely impact on ***international marketing opportunities***
2. Assess international business and	2.1. Identify and analyse impact of economic, political, ***social and cultural factors*** affecting international

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ELEMENT	PERFORMANCE CRITERIA
electronic commerce market factors	market on international marketing opportunities 2.2. Investigate international market trends and developments to identify market needs relative to the business 2.3. Identify new and emerging business and electronic commerce markets, and assess opportunities to enter, shape or influence markets in terms of their fit with business goals and direction, and their likely contribution to the business
3. Identify risk factors for international marketing opportunities	3.1. Analyse and rate acceptability of political, financial stability and corruption ***risk factors*** for potential market 3.2. Analyse and rate acceptability of legal and regulatory requirements, and trade barriers for potential market 3.3. Relate risk factors to international business cycles in terms of ***economic conditions*** and estimate their impact on potential market
4. Investigate international business and electronic commerce marketing opportunities	4.1. Identify and analyse international marketing opportunities in terms of their likely fit with the organisation's goals and capabilities 4.2. Evaluate each opportunity to determine its impact on current business and customer base 4.3. Use an assessment of costs, benefits, risks and opportunities to determine financial viability of each marketing opportunity 4.4. Determine probable return on investment and potential competitors 4.5. Describe and rank marketing opportunities in terms of viability and likely contribution to the business

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to gather information and to communicate with cultural sensitivity

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REQUIRED SKILLS AND KNOWLEDGE

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to read and interpret information from a variety of sources
- research, information management and evaluation skills to determine viable international business opportunities through careful analysis of market and risk factors
- technology skills to use a range of office equipment and software when conducting electronic commerce.

Required knowledge

- Australian Standards and international standards, including those covering:
  - environmental matters
  - human rights
  - labour relations
  - packaging
  - risk management
- cross-cultural communication and negotiation styles relevant to the country or countries being considered for market entry or for further market penetration
- global and country specific economic, social and industry directions, trends, practices and techniques
- Organisation for Economic Co-operation and Development (OECD) International Guidelines for Consumer Protection in the Context of Electronic Commerce
- Australian Government Policy Framework for Consumer Protection in Electronic Commerce
- Australian Guidelines for Electronic Commerce
- key provisions of relevant legislation from all forms of government, codes of practice and national and international standards that may affect aspects of business operations within Australia and internationally, such as:
  - anti-discrimination legislation
  - consumer laws
  - ethical principles
  - extra-territoriality provisions of the Trade Practices Act
  - foreign investment limits
  - labour laws
  - legal aspects of bilateral and multi-lateral trade agreements
  - privacy laws
  - taxation laws
  - World Trade Organization (WTO) dispute resolution system
- organisational business and marketing plans, products and services
- software applications used in conducting international electronic commerce.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• documenting and presenting an evaluation of various international marketing opportunities including:
	  • analysing the global business environment
	  • assessing social, cultural, political and economic factors impacting on the selection of which market opportunities to select
	  • conducting a risk assessment for each opportunity considered
	  • analysing the financial viability of selected international marketing opportunities

Context of and specific resources for assessment	Assessment must ensure: • access to information sources on countries and markets being considered for entry or further penetration • access to office equipment and resources • access to examples of previous international marketing evaluation documents, strategic plans and marketing plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on evaluation and selection of marketing opportunities • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations on market evaluation activities • observation of techniques used to identify and assess

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EVIDENCE GUIDE	
	risks, and to financially analyse possible market opportunities • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBMKG606B Manage international marketing programs • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
International business and electronic commerce market factors may include:	• cost of funds • cultural and political groupings • currency exchange rates • customer service factors • distribution channels • geographical groupings • government assistance • growth factors • incentives • industrial structure • interest rates • investment rates • level of economic development • online customer groupings

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RANGE STATEMENT	
	• political systems • social and cultural factors • tariffs • technology and telecommunications infrastructure • trade groupings • trade relations with Australia • trade restrictions • virtual communities

International trade policies and agreements may include:	• customs unions
	• bilateral trade agreements such as:
	  • Australia-US Free Trade Agreement (AUSFTA)
	  • Singapore-Australia Free Trade Agreement (SAFTA)
	  • Thailand-Australia Free Trade Agreement (TAFTA)
	  • Australia-New Zealand Closer Economic Relations Trade Agreement (ANZCERTA)
	• multi-lateral trade agreements such as the WTO agreements for goods, services and intellectual property, including:
	  • agriculture
	  • air transport
	  • anti-dumping measures
	  • customs valuation methods
	  • financial services
	  • health regulations for farm products
	  • import licensing
	  • investment measures
	  • movement of natural persons
	  • preshipment inspection
	  • product standards
	  • rules of origin
	  • safeguards
	  • shipping
	  • subsidies and counter measures
	  • telecommunications
	  • textiles and clothing

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RANGE STATEMENT	
	• other multi-lateral trade agreements such as: • European Union trade regulations
International marketing opportunities may include:	• agents • direct investment • exporting • intermediaries • joint ventures • licensing • online business opportunities • strategic alliances
Social and cultural factors may include:	• behaviours • currency • customs • family role and status • language • legal system • political system • preferences • social values • traditions
Risk factors may include:	• available technology • communication systems • corruption risks • cultural factors • financial stability • language factors • legal and regulatory requirements • legal risks in selling goods and services online to the international market • logistics • political stability • resource availability, sustainability and management • resource capability and capacity • telecommunications infrastructure • trade barriers • transportation systems • work factors
Economic conditions may	• depression • prosperity

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RANGE STATEMENT	
include:	• recession • recovery

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG606B Manage international marketing programs

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to formulate, assess, strategically manage, evaluate and improve international marketing programs. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to senior marketing or management personnel who are required to manage international marketing activities including evaluating international marketing opportunities, setting marketing objectives and determining the approach and operational structure for an organisation marketing internationally. Individuals undertaking this unit are also required to manage a team of people implementing international marketing opportunities, including monitoring, evaluating and improving activities as required. BSBMKG605B Evaluate international marketing opportunities, may be undertaken before or in conjunction with this unit.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Formulate international marketing objectives	1.1. Select viable international marketing opportunities and develop objectives that are consistent with the organisation's capabilities and resources 1.2. Identify measurable international marketing objectives that are consistent with the organisation's strategic direction, and identify the nature and extent of what is to be achieved in the international market 1.3. Formulate strategic objectives and related key performance indicators by product, service, country or ***international grouping***, and overall 1.4. Develop a ***risk management strategy*** to manage contingencies and ensure marketing objectives are met in accordance with overall organisational requirements

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ELEMENT	PERFORMANCE CRITERIA
2. Determine international marketing approach	2.1. Research international marketing opportunities and determine global or customised approaches for promotion of products or services 2.2. Evaluate options for choice of ***marketing approaches*** 2.3. Select a marketing approach that meets marketing objectives, international market conditions and consumer preferences
3. Determine operational structures	3.1. Evaluate business culture and consumer preferences, and identify compatible marketing structures 3.2. Identify options for ***operational marketing structure*** and rank them in terms of their ***strengths and weaknesses*** in servicing international markets 3.3. Choose an operational structure that best fits the international market and product or service
4. Manage international marketing performance	4.1. Communicate international marketing objectives across the organisation in ways suited to culture, customs, levels of knowledge, experience and needs of personnel 4.2. Identify and agree roles, responsibilities and accountabilities of staff and contractors involved in all elements of marketing effort 4.3. Develop a communication strategy to ensure that personnel responsible for each element of ***marketing mix*** work together to meet organisation's marketing objectives 4.4. Manage marketing effort to ensure it is directed towards areas of greatest potential for the organisation 4.5. Manage integration of marketing, promotional and any sales activities in accordance with international marketing objectives
5. Evaluate and improve international marketing performance	5.1. Monitor product, pricing and distribution policies in relation to market changes, objectives of marketing plan and organisational requirements 5.2. Monitor overall marketing progress against performance targets to ensure activity, quality, cost, and time requirements are met 5.3. Analyse, review and revise marketing outcomes and objectives 5.4. Analyse successes and performance gaps as to cause and effect, and use them to improve international

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ELEMENT	PERFORMANCE CRITERIA
	marketing performance 5.5. Analyse changes in market phenomena, and identify and document their potential impact on international marketing objectives 5.6. Document the review of marketing performance against key performance indicators in accordance with organisational requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to gather information and communicate with cultural sensitivity • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • literacy skills to read and interpret information from a variety of sources • numeracy and financial skills to determine budgets and financial viability of international marketing activities • research, information management and evaluation skills to determine viable international business opportunities through careful analysis of market and risk factors • technology skills to use a range of office equipment and software when conducting electronic commerce.
Required knowledge

• Australian E-commerce Best Practice Model
• Australian Government Policy Framework for Consumer Protection in Electronic Commerce
• Australian Standards and international standards, including:
  • environmental standards
  • human rights
  • labour relations
  • packaging
  • risk management
• cross-cultural communication and negotiation styles relevant to the country/ies where international marketing activities take place

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REQUIRED SKILLS AND KNOWLEDGE

• global and country specific economic, social and industry directions, trends, practices and techniques
• key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations within Australia and internationally, such as:
  • anti-discrimination legislation
  • consumer laws
  • ethical principles
  • extra-territoriality provisions of the Trade Practices Act
  • foreign investment limits
  • labour laws
  • legal aspects of bilateral and multi-lateral trade agreements
  • privacy laws
  • taxation laws
  • World Trade Organization (WTO) dispute resolution system
• Organisation for Economic Co-operation and Development (OECD) International Guidelines for Consumer Protection in the Context of Electronic Commerce
• organisational business and marketing plans, products and services
• software applications used in conducting international electronic commerce.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• documenting and presenting:
	  • international marketing objectives
	  • selected marketing approach
	  • creation of an operational structure
	• effectively managing international marketing activities
	• monitoring and evaluating international marketing performance, and making any necessary adjustments

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EVIDENCE GUIDE	
	as required • formulating suggestions on how marketing activities could be affected in the future.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to organisational strategic and marketing plans, and other relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports • demonstration of performance management, financial risk or other management techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBMKG603B Manage the marketing process • BSBMKG605B Evaluate international marketing opportunities • other marketing units • management units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised

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RANGE STATEMENT	
wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
International grouping may include:	• cultural groupings • geographical groupings • online virtual communities • political groupings • trade groupings
Risk management strategy may include:	• risk analysis • risk assessment and prioritisation • risk identification • risk maintenance • risk treatment and controls • risk evaluation • risk monitoring • monitoring risks • making adjustments to risk treatments and controls

Marketing approaches may include:	• customised
	• global
	• online
	• product or promotion adaptation
	• product or promotion standardisation
	• segmentation by criteria which are:
	  • behaviouristic
	  • demographic
	  • end use
	  • geographic
	  • operational
	  • psychographic

Operational marketing structure may include:	• export operation • global organisation • joint venture • licensing • multi-national organisation • online business operation • overseas branch • strategic alliance

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RANGE STATEMENT	
	• subsidiary company
Strengths and weaknesses may include:	• accessibility • distribution channels • financial factors • manufacturing capability • market capability • potential profit factors • research capability • resource commitment • risk control

Marketing mix may include:	• distribution
	• level of service
	• pricing
	• product or service variables such as:
	  • design
	  • quality
	  • range
	  • safety features
	  • technical features
	• promotion

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBMKG607B Manage market research

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to prepare for, manage and evaluate market research projects across an organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to senior marketing professionals who are responsible for preparing market research plans for implementation, engaging external consultants, managing market research activity, and evaluating research processes and findings across an organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare market research plans for implementation	1.1. Determine ***research policies and procedures*** 1.2. Develop or commission and review a market research project plan and detailed work plans to point of ***finalisation*** 1.3. Execute ***processes to obtain required resources*** to implement a market research project plan and work plans
2. Engage external consultants or service providers	2.1. Identify requirements for external consultants from market research project plan 2.2. Specify goods and services required to implement plans, and detail criteria for selection 2.3. Identify, evaluate and select potential consultants or other providers of required goods and services 2.4. Contract selected consultants or providers of goods and services
3. Manage market research activity	3.1. ***Monitor work plan activity*** to ensure adherence to market research project plan and work plans, and consistency with organisational market research policy and procedures 3.2. Manage external consultants or service providers to ensure performance is in line with expectations and contractual requirements
4. Evaluate research	4.1. Confirm validity of information and data obtained

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ELEMENT	PERFORMANCE CRITERIA
processes and findings	by market research 4.2. Review relevance and usefulness of findings against research objectives outlined in market research project plan 4.3. Assess performance of project against all relevant elements of market research project plan and work plans 4.4. Measure ***stakeholder*** satisfaction with research process and findings 4.5. Prepare reports on future improvements to research process 4.6. Implement revised policy and practices in accordance with organisational requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication and interpersonal skills to establish rapport and build relationships with clients and external contractors; and to liaise with stakeholders • creativity and innovation skills to design market research project plan • information management skills to collate and extract relevant findings from information collected • management skills to monitor work plans • problem-solving skills to deal with complex planning and implementation • leadership and teamwork skills to manage others within the organisation and external contractors conducting market research activity.
Required knowledge

• principles and practices of market research including:
  • data processing methods and data analysis techniques
  • project design to meet given budgets and other resource constraints
  • qualitative and quantitative research
  • design of samples
  • development and application of hypotheses
  • role of research in enterprise development

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REQUIRED SKILLS AND KNOWLEDGE

• use of survey instruments
• project management principles and practices including for:
  • consultation and stakeholder involvement
  • development of policies and procedures
  • methods of action to ensure performance
  • monitoring of time lines, budgets and other implementation plans
  • organisational procedures for engagement of consultants
• key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as:
  • confidentiality requirements
  • copyright laws
  • defamation laws
  • privacy laws
  • sweepstakes regulations
  • Trade Practices Act
• economic, social and industry directions, trends, and practices; organisational structures, roles, responsibilities and policies; industry product and service knowledge.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • preparing at least one market research plan • developing specifications for research components outsourced to external consultants as appropriate • managing market research activities in accordance with organisational market research policy and procedures • evaluating research processes and findings against relevant market research project plan and work plans • preparing and presenting a report on market research

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EVIDENCE GUIDE	
	findings.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to previous market research plans and exemplars of market research project specifications.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports evaluating market research activities • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Research policies and procedures may include:	• measures taken to ensure quality of data and to set validity and reliability requirements

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RANGE STATEMENT	
	• occupational health and safety procedures, practices, policies and precautions • opportunities for involvement of enterprise staff and other stakeholders • performance indicators, targets and specifications • privacy and confidentiality guidelines, and ethical considerations • procedures to accurately document findings and to ensure accuracy is being attained • relevant national, state and local legislation
Finalisation may include:	• additional detail on any matter of operations that was not required for approved plans but is required for action by researchers or other relevant personnel
Processes to obtain required resources may involve:	• liaison and negotiation with key stakeholders • organisational procedures and requirements for obtaining resources • written and oral submissions for resources
Monitoring work plan activity may include:	• amending work plan if necessary • documenting what is required of researchers, by when and with what resources • conducting meetings, briefings or providing direct supervision • providing opportunities for feedback, support, advice and debriefing for research workers • developing and implementing procedures for regular reviews of progress
Stakeholders may include:	• Board • chief executive officer • management committee • marketing personnel • other managers • owners • production staff • senior management team • supervisors • team members

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units		

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BSBMKG608A Develop organisational marketing objectives

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to conduct a strategic analysis to develop organisational marketing objectives. This involves reviewing the organisation's internal and external environments, evaluating past and current marketing performance, and exploring and evaluating new marketing opportunities. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to senior marketing professionals who are responsible for providing strategic direction to the marketing function of an organisation. Their responsibilities include analysing information on the internal and external business and marketing environment; examining current marketing performance; identifying new marketing opportunities arising from emerging trends; and devising strategies to achieve overall business objectives. Individuals operating at this level will generally conduct these activities using information gathered by people working under their direct and indirect supervision at lower levels of the organisation. This unit should be assessed either before or in conjunction with BSBMKG609A Develop a marketing plan, which covers the skills and knowledge to devise specific marketing strategies and tactics arising from formulation of marketing objectives.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify strategic direction	1.1. Confirm organisation's mission, vision, purpose and values from current organisational materials or from owners, directors or senior management 1.2. Analyse ***strategic organisational documents*** to identify organisational directions and targets 1.3. Complete a ***situational analysis*** that identifies factors impacting on the direction and performance of the business 1.4. Identify ***legal and ethical requirements*** for the

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ELEMENT	PERFORMANCE CRITERIA
	organisation 1.5. Document and confirm the strategic direction of the organisation with owners, directors or senior management, and identify its impact on marketing activities
2. Review marketing performance	2.1. Evaluate the effectiveness of previous marketing and positioning strategies to identify lessons learned 2.2. Analyse current key products or services and major markets for strengths, weaknesses, opportunities and threats 2.3. Evaluate previous marketing opportunities captured by the organisation, and examine and document their profitability 2.4. ***Evaluate marketing performance*** against previous objectives, targets to identify critical success factors, and areas for improvement
3. Scope marketing opportunities	3.1. Identify and analyse marketing opportunities in terms of their viability and likely contribution to the business 3.2. Use an assessment of external factors, costs, benefits, risks and opportunities to determine the scope of each marketing opportunity 3.3. Analyse opportunities in terms of their likely fit with organisational goals and capabilities 3.4. Evaluate each opportunity to determine its likely impact on current business and customer base
4. Formulate marketing objectives	4.1. Develop objectives in consultation with ***key internal stakeholders*** that are attainable and measurable, and that identify the nature and extent of what is to be achieved 4.2. Ensure objectives are consistent with the forecast needs of the business and the market 4.3. Ensure objectives are compatible with the organisation's projected capabilities, resources and financial position 4.4. Ensure objectives are compatible with the organisation's direction and purpose, and meet legal and ethical requirements 4.5. Formulate long term strategic objectives and related key performance indicators by product or service, market segment and overall 4.6. Develop a risk management strategy to identify risks

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ELEMENT	PERFORMANCE CRITERIA
	and manage contingencies, and to ensure that marketing objectives are met in accordance with overall organisational requirements 4.7. Document marketing objectives

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to question, clarify and report • information management skills to extract relevant details when conducting strategic analysis • literacy skills to write in a range of styles for different audiences, and to interpret legal requirements and strategic organisational documents • numeracy skills to analyse marketing performance data.
Required knowledge

• financial management techniques
• key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as:
  • Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice
  • Australian E-commerce Best Practice Model
  • Australian Government Policy Framework for Consumer Protection in Electronic Commerce
  • confidentiality requirements
  • copyright laws
  • defamation laws
  • Free TV Australia Commercial Television Industry Code of Practice
  • anti-discrimination legislation and principles of equal opportunity, equity, and diversity
  • privacy laws
  • sweepstakes regulations
  • Trade Practices Act
• organisational structure, policies, procedures, products or services and overall

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REQUIRED SKILLS AND KNOWLEDGE
strategic plans • principles and concepts of marketing and evaluation methodologies • strategic, operational and tactical analysis techniques.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• developing marketing objectives for an organisationincluding:
	  • undertaking strategic analysis reviewing current marketing performance
	  • formulating short and long term marketing objectives
	• developing a marketing risk management strategy.

Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to examples of previous strategic and marketing strategic, analyses and plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on strategic analysis conducted and formulated objectives • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations on marketing performance and objectives • oral or written questioning • review of authenticated documents from the

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EVIDENCE GUIDE	
	workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBMKG609A Develop a marketing plan • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Strategic organisational documents may include:	• annual reports • codes of practice • company policy • customer service charter • security and privacy policies • strategic marketing plans • strategic plans
Situational analysis may include:	• collaborators analysis • competitive analysis • environmental analysis • market analysis • market measurements • productivity or profitability analysis
Legal and ethical requirements may include:	• codes of practice • cultural expectations and influences • environmental issues • ethical principles • health and safety of workplace personnel • legislation

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RANGE STATEMENT	
	• policies and guidelines • regulations • security and privacy issues • social responsibilities • societal expectations
Evaluating marketing performance may include:	• comparative analysis • competitive analysis • life cycle models • product portfolio analysis • strengths, weaknesses, opportunities, threats (SWOT) analysis • value chain analysis
Key internal stakeholders may include:	• Board of directors • finance staff • human resources staff • IT staff • managers • marketing personnel • owners • production staff • supervisors

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBMKG609A Develop a marketing plan

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to research, develop and present a marketing plan for an organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in senior marketing positions who are responsible for formulating a marketing plan by developing specific marketing strategies and tactics in accordance with the organisation's overall marketing objectives. Individuals operating at this level may receive input from people working under their supervision who collect information required to devise specific marketing strategies and tactics. This unit builds on BSBMKG608A Develop organisational marketing objectives, which covers the skills and knowledge required to conduct a strategic analysis to formulate organisational marketing objectives.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Devise marketing strategies	1.1. Evaluate ***marketing opportunity options*** that address organisational objectives, and evaluate their risks and returns in the selection process 1.2. Develop ***marketing strategies*** that address strengths and opportunities within the organisation's projected capabilities and resources 1.3. Develop strategies which increase resources or organisational expertise where gaps exist between current capability and marketing objectives 1.4. Develop feasible marketing strategies and communicate reasons that justifies their selection 1.5. Ensure strategies align with organisation's strategic direction 1.6. Develop a ***marketing performance review strategy***,

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ELEMENT	PERFORMANCE CRITERIA
	incorporating appropriate marketing metrics to review of organisational performance against marketing objectives
2. Plan marketing tactics	2.1. Detail tactics to implement each marketing strategy in terms of scheduling, costing, accountabilities and persons responsible 2.2. Identify coordination and monitoring mechanisms for scheduled activities 2.3. Ensure tactics are achievable within organisation's projected capabilities and budget 2.4. Ensure tactics meet ***legal and ethical requirements*** 2.5. Ensure tactics provide for ongoing review of performance against objectives and budgets, and allow marketing targets to be adjusted if necessary
3. Prepare and present a marketing plan	3.1. Ensure marketing plan meets organisational, as well as marketing, objectives and incorporates ***marketing approaches*** and a strategic ***marketing mix*** 3.2. Ensure marketing plan contains a rationale for objectives and information that supports the choice of strategies and tactics 3.3. Present marketing plan for approval in the required format and timeframe 3.4. Adjust marketing plan in response to feedback from key stakeholders and disseminate for implementation within the required timeframe

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • leadership skills to gain trust and confidence of colleagues and clients • literacy skills to identify company and product or service information, to interpret strategic reports, to write in a range of styles for different audiences and to interpret legal requirements, company policies and procedures • numeracy skills to analyse, create and manage budgets for marketing activities

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REQUIRED SKILLS AND KNOWLEDGE
• organisational and time management skills to sequence tasks and meet time lines • presentation and facilitation skills to present a marketing plan.
Required knowledge

• organisational structure, products and services, overall strategic and marketing objectives
• key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects of business operations such as:
  • anti-discrimination legislation and principles of equal opportunity, equity, and diversity
  • Australian Direct Marketing Association (ADMA) Direct Marketing Code of Practice
  • Australian E-commerce Best Practice Model
  • Australian Government Policy Framework for Consumer Protection in Electronic Commerce
  • confidentiality requirements
  • copyright laws
  • defamation laws
  • Free TV Australia Commercial Television Industry Code of Practice
  • privacy laws
  • sweepstakes regulations
  • Trade Practices Act
• industry products and services knowledge.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • devising, documenting and presenting a marketing plan detailing approaches and the marketing mix to achieve organisational marketing objectives.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to strategic plans and marketing objectives.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written marketing plans outlining marketing strategies and tactics to be used in achieving organisational marketing objectives • demonstration of techniques used to develop marketing strategies in conjunction with relevant persons • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentation of marketing plan to relevant persons • oral or written questioning • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBMKG608A Develop organisational marketing objectives • other marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Marketing opportunity options	• cooperative ventures • exports

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RANGE STATEMENT	
may include:	• extending, expanding or otherwise changing an existing business • franchising • joint ventures • new businesses • new products or services for existing markets • new products or services for new markets • potential for greater penetration of existing markets with existing products or services • strategic alliances • take-overs
Marketing strategies may include:	• achieving lower costs of production and distribution than competitors • creating a very different product line or service so that the business becomes a class leader in the industry • distribution • pricing, presentation and display of products or services • product design and packaging • product range and mix • promotion and advertising • pursuing cost leadership or product differentiation within a specialist market segment
Marketing performance review strategy may include:	• comparative analysis • competitive analysis • life cycle models • product portfolio analysis • strengths, weaknesses, opportunities, threats (SWOT) analysis • value chain analysis
Legal and ethical requirements may include:	• codes of practice • cultural expectations and influences • environmental issues • ethical principles • legislation • policies and guidelines • regulations • safety issues • security and privacy issues

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RANGE STATEMENT	
	• social responsibilities • societal expectations
Marketing approaches may include:	• differentiated target marketing • direct marketing • direct response marketing • e-business • mass distribution • mass marketing • personal selling • product variety marketing • promotion marketing

Marketing mix may include:	• product or service variables such as:
	  • technical features
	  • design
	  • quality
	  • range
	  • safety features
	• pricing
	• promotion
	• distribution
	• level of service

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Marketing

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBMKG610A Develop, implement and monitor a marketing campaign

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package.* Outdated advice removed

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to design marketing campaigns, to implement campaigns and to analyse the success of a campaign.

Application of the Unit

This unit applies to marketing campaigns conducted in support of enterprise or client marketing activities which involve a unique set of resourcing, planning and implementation activities.

Competence in this unit requires designing, implementing, monitoring, analysing and reviewing the success of a marketing campaign

This role may be undertaken by staff with managerial responsibility or specialist staff (campaign manager, operations manager), depending on size and structure of the organisation.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Design a campaign	1.1. Identify critical ***campaign*** design features from business needs and objectives 1.2. Develop campaign objectives 1.3. Identify required campaign resources 1.4. Establish appropriate organisational, team and individual targets 1.5. Develop campaign procedures for all relevant parties 1.6. Confirm campaign design by consulting with ***stakeholders*** 1.7. Identify technical requirements to support campaign 1.8. Ensure campaign design complies with ***relevant legislation and regulatory codes***
2. Implement campaign and monitor outcomes	2.1. Use ***project management tools*** effectively 2.2. Establish real-time campaign monitoring and reporting 2.3. Accurately analyse campaign results at regular intervals 2.4. Conduct effective campaign debriefing with staff and key stakeholders
3. Analyse fulfilment processes	3.1. Map existing ***fulfilment processes*** 3.2. Collect comprehensive data on campaign fulfilment performance 3.3. Conduct effective ***process improvement analysis*** 3.4. Establish appropriate new processes or standards

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ELEMENT	PERFORMANCE CRITERIA
	3.5. Specify and establish an appropriate tracking mechanism
4. Present campaign results to relevant business units	4.1. Conduct an effective written and oral presentation 4.2. Focus on critical aspects of the campaign in the presentation 4.3. Clearly communicate required action of other parties 4.4. Communicate and resolve campaign process concerns and issues
5. Prepare campaign cost-benefit analysis	5.1. Collect relevant campaign data 5.2. Accurately calculate cost of calls and other transactions 5.3. Accurately assess immediate and longer term financial gains of campaign 5.4. Communicate appropriate performance and financial results to relevant parties

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to analyse workplace information and data, and to make observations of workplace tasks and interactions with people, their activities, equipment, environment and systems
- communication skills to conduct formal and informal meetings and to communicate with personnel at all levels
- consultation and negotiation skills to develop and implement plans and campaigns effectively
- financial skills to manage budgetary resources
- information technology skills to effectively manage and analyse data
- interpersonal skills to establish rapport; to build relationships with clients, team members and stakeholders; to establish relevant networks
- leadership skills to gain trust and confidence of colleagues and clients
- numeracy skills to analysis data to determine success
- presentation skills to develop and present reports or presentations which deal with complex ideas and concepts, and to articulate ideas and information effectively
- problem-solving skills to create innovative solutions to issues that arise
- project management skills to design and implement campaigns within project management guidelines.

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Required knowledge

- business objectives and requirements
- campaign design and evaluation principles
- competitor activity and products/services
- customer contact technology and databases
- legislation, regulatory and organisational requirements
- operational budget and business planning
- organisational communication methods.

Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • designing, implementing, controlling, monitoring and reviewing a marketing campaign • knowledge of relevant legislation, regulatory and organisational requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace information and data • access to information and databases for analysis activities • access to relevant legislation, regulations, standards and guidelines • access to stakeholder feedback.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of campaign project plan • review of communication plan • review of documentation of processes and technical requirements • review of campaign reporting

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	• analysis of campaign results (against target) • review of process improvement plan • oral and/or written questioning to assess knowledge of stakeholder feedback • review of analysis and valuation of campaign processes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Campaign may include:	• courtesy/follow-up calls • data collection • loyalty program • re-contracting • retention offers • sales • value add services
Stakeholders may include:	• billing • company for which campaign is being undertaken (under outsourcing arrangements) • credit and collections • executive • own sales and support team • sales and marketing
Relevant legislation and regulatory codes may include:	• consumer credit codes • Do Not Call Register • industry specific codes • marketing codes • Privacy Act • Trade Practices Act
Project management tools may include:	• application of quality processes • generic management tools • purpose built campaign management tools

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	• risk assessment and management • standard project management practices
Fulfilment processes may include:	• after sales support • billing • data entry • despatch of field staff • despatch of necessary documentation and collateral • establishment of new or renewed contract provisioning of new services • supply and delivery of new product
Process improvement analysis may include:	• after sales support • analysis of extra calls generated by campaign • analysis of reliability and performance of fulfilment process • customer satisfaction surveying • modifications that can be adopted for future campaigns • overall results against targets • performance and results of individuals and teams • quality of databases and data integrity • review of processes used • sales conversion rate analysis • stakeholder feedback (including team, sales and marketing)
	•
	•

Unit Sector(s)

Business Development - Marketing

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BSBMKG611A Manage measurement of marketing effectiveness

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage a strategy to measure the effectiveness of a marketing activity using a range of marketing metrics. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to senior marketing professionals who are in a strategic role, responsible for managing the measurement of marketing effectiveness. They may work in small, medium or large enterprises and in a variety of industries.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare for implementation of a strategy to measure marketing effectiveness	1.1. Review current marketing strategies and marketing plans and research a range of ***metrics*** available to measure effectiveness of relevant ***marketing processes and functions*** 1.2. Analyse effectiveness of current marketing metrics used by the organisation in each key marketing operation 1.3. Critically analyse how existing marketing metrics link to strategy and opportunities to improve the links 1.4. Plan to address any ***issues*** with the use of marketing metrics within the organisation 1.5. Design ***criteria*** for retaining existing marketing metrics and for selecting new manageable and cost-effective metrics 1.6. Gain approval for the design or redesign of the strategy from senior management
2. Design strategy to measure marketing effectiveness	2.1. Set objectives for the measurement and evaluation of marketing effectiveness 2.2. Select methods to measure marketing performance for each marketing process or function, tailored to the organisation's brand or unique positioning 2.3. Calculate costs of gathering and analysing data with the assistance of relevant financial experts

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ELEMENT	PERFORMANCE CRITERIA
	2.4. Design and record the implementation strategy for measuring and analysing marketing performance, or make recommendations for improving current strategy
3. Manage, implement and evaluate the strategy to measure marketing effectiveness	3.1. Design and implement an appropriate communication and training strategy, so that marketing and other relevant personnel fully understand their role in measuring marketing effectiveness 3.2. Supervise the design and implementation of specific metrics 3.3. Plan and monitor work activity to ensure adherence to strategy for measurement of marketing effectiveness 3.4. Design process to review and evaluate marketing metrics on a regular basis and if organisational strategy changes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - train staff
  - write and present complex reports to key decision makers
- learning skills to review and evaluate marketing metrics in order to contribute to operational outcomes
- numeracy skills to:
  - analyse marketing data
  - calculate cost-effectiveness of collecting and analysing data
  - design and review metrics
- planning and organising skills to:
  - plan and implement a strategy to measure marketing performance
  - plan work activities
- problem-solving skills to devise solutions to issues with the use of marketing metrics

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REQUIRED SKILLS AND KNOWLEDGE
• technology skills for research and data analysis
Required knowledge
• factors to consider in designing and implementing a communication and training strategy • range of marketing functions within an organisation • range of marketing metrics and their usefulness in measuring key marketing operations • relationship between marketing metrics and the need for marketing directors, chief financial officers, chief executive officers and board members to be able to monitor marketing performance

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• design of a strategy for measuring marketing performance which includes:
	  • objectives
	  • metrics
	  • costs
	  • implementation strategy
	  • evaluation strategy
	• choice, design and implementation of specific chosen metrics as required by strategy
	• design of a training program for relevant personnel about their role in measuring marketing effectiveness.

Context of and specific resources for assessment	Assessment must ensure access to: • a workplace or simulated work environment • relevant workplace documents and data, in particular data already collected to measure marketing effectiveness • office equipment and resources, including appropriate software.

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Method of assessment	The following assessment methods are appropriate for this unit:
	• review of portfolio of evidence of actions taken to produce a strategy to measure marketing performance
	• oral or written questioning to assess:
	  • actions taken to produce the strategy to measure marketing performance
	  • knowledge of marketing metrics and their uses for different phases of the marketing process and for different marketing outcomes
	• analysis of responses to case studies and scenarios around marketing metrics
	• demonstration of a training strategy for relevant personnel to introduce them to the use of the marketing metrics.

Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Metrics may include:	• accounting and financial outcomes
	• brand equity, such as:
	  • availability
	  • brand perception
	  • familiarity
	  • loyalty and retention
	  • penetration
	• brand value
	• competition
	• customer databases
	• customer acquisition, satisfaction, retention, value and loss

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RANGE STATEMENT	

	• communications and effectiveness
	• e-metrics, such as:
	  • hits
	  • page views
	  • visits
	• inventory efficiency and effectiveness
	• market performance by customer and product
	• market share
	• overall sales
	• return on marketing investment in market-based assets
	• sales force effectiveness
	• share of mind
	• share of voice
	• share of wallet
	• shareholder value.

Marketing processes and functions may include:	• advertising • direct marketing • distribution • e-marketing • loyalty programs • market research • marketing communications • pricing • product development, including pre- and post-launch • sales force.
Issues may include:	• cost of obtaining meaningful information • differences in treatment of intangible assets in financial statements • frequency of measurement • level of management that reviews the metrics • skill of marketing personnel in terms of measurement • volume of data to be analysed.

Criteria may include:	• costs (money and time) involved in measuring
	• possible benefits of measurement
	• risks if measurement does not occur
	• whether they are:
	  • cost-effective
	  • precise and sensitive to change
	  • predictive, e.g. of future customer purchase, retention

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RANGE STATEMENT	
	and cash flow • relevant to the organisation's strategy and context • reliable over time so trends can be tracked.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business development - marketing

Co-requisite units

Co-requisite units		

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BSBOHS201A Participate in OHS processes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to participate in workplace occupational health and safety (OHS) processes to protect workers own health and safety, and that of others. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who require a fundamental knowledge of OHS to carry out their own work which may be in a defined context under direct supervision or with some individual responsibility. This unit has broad applicability across industries and workplace contexts.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Work safely	1.1. Follow established ***safety procedures*** when conducting work 1.2. Carry out pre-start systems and equipment checks in accordance with workplace procedures
2. Implement workplace safety requirements	2.1. Identify ***designated persons*** for reporting queries and concerns about safety in the workplace 2.2. Identify existing and potential ***hazards*** in the workplace, report them to designated persons and record them in accordance with workplace procedures 2.3. Identify and implement workplace procedures and work instructions for controlling risks 2.4. Report ***emergency incidents*** and injuries to designated persons
3. Participate in OHS consultative processes	3.1. Contribute to workplace meetings, inspections or other consultative activities 3.2. Raise OHS issues with designated persons in accordance with organisational procedures 3.3. Take actions to eliminate workplace hazards or to reduce ***risks***
4. Follow safety procedures	4.1. Identify and report emergency incidents 4.2. Follow organisational procedures for responding to emergency incidents

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to interpret safety signs, symbols and notices • problem-solving skills to analyse options in an emergency situation.
Required knowledge
• responsibilities of employers and employees under relevant health and safety legislation • emergency procedures including procedures for fires and accidents • commonly used hazard signs and safety symbols.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • accurately following all relevant safety procedures • identifying and reporting hazards to designated personnel • knowledge of relevant health and safety legislation • knowledge of relevant materials, equipment and work processes.
Context of and specific resources for assessment	Assessment must ensure: • safety processes, hazards and risk are relevant to the area of work
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

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EVIDENCE GUIDE	
	• analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation identifying and reporting emergency incidents
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units related to the work environment

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Safety procedures may include:	• completing required documentation
	• local, state and federal legislation
	• Materials Safety Data Sheets (MSDSs)
	• National Health and Medical Research Council guidelines
	• following OH&S guidelines relevant to workplace
	• maintenance and use of cleaning apparatus in a work environment, such as;
	  • disposing of spilled substances, dangerous products, 'sharps' and waste correctly
	  • maintaining stocks of cleaning equipment (eg. disposable gloves, liquid repellent aprons, disinfectant)
	  • sterilising and/or disposing of cleaning equipment
	  • using appropriate cleaning equipment to clean spillages and breakages

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RANGE STATEMENT	

	• wearing protective clothing, protective eye wear when in contact with body fluids or chemicals that may splash
	• using and storing toxic and hazardous materials correctly
	• keeping workplace clean and tidy
	• office practice manual
	• displaying health and safety brochures, magazines and other material
	• undergoing operator training when using new equipment or processes
	• special guidelines in a medical setting:
	  • RACGP Code of Practice for the Management of Health Information in General Practice
	  • RACGP Entry Standards for General Practices
	  • RACGP Sterilisation/Disinfection guidelines for General Practice

Designated persons may include:	• designated health and safety officers • health and safety representatives • supervisors • managers • team leaders • other persons authorised or nominated by the enterprise or industry

Hazards may include anything which is a source of:	• potential harm in terms of human injury or ill health
	• damage to property
	• damage to the environment
	• potential harm in terms of human injury or ill health including:
	  • toxic or hazardous materials
	  • hazardous work processes
	  • unsafe work practices
	  • hazardous equipment
	  • unstable personnel
	• potential harm in a medical setting:
	  • blood
	  • breakage / spillage

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RANGE STATEMENT	
	• drug hold-ups • needle sticks • medical emergencies (eg. Falls, bleeding, seizures, fainting, collapses, panic attack, psychosis) • spread of infection • potential sources of infection: • breakages • contaminated waste • patients with colds, flu and other infectious diseases • sharps (eg. needles, scalpel blades) • spillage • used dressings, bandages and equipment • unsterilised/poorly sterilised equipment and work surfaces • unwashed hands
Risk is:	• the chance of something occurring that will result in injury or damage
Emergency incidents may include:	• accidents • emergency situations • fire • flood • sudden illness • incidents • external threats

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

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Co-requisite units

Co-requisite units		

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BSBOHS301B Apply knowledge of OHS legislation in the workplace

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to apply understanding of the occupational health and safety (OHS) legal framework in the workplace. It includes determining relevant legislation and contributing to any actions to ensure compliance with OHS legislation, codes and standards is achieved. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who assist OHS specialists and contribute to compliance with OHS legislation in the workplace.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Determine the legal framework of OHS in the workplace	1.1. Identify and access current ***OHS legislation***, ***codes***, ***standards***, policies and procedures impacting on the workplace, occupation and industry 1.2. Apply knowledge of the relationship between OHS legislation, codes, and standards to assist in identifying OHS legal requirements in the workplace 1.3. Identify duty of care arrangements 1.4. Identify legal obligations and duties for consultation with and training of employees, safety representatives and others 1.5. Identify consequences of ***non-compliance*** with OHS legislation, codes, standards and workplace policies and procedures
2. Apply knowledge of OHS legislation, policies and procedures in the workplace	2.1. Contribute to monitoring compliance with OHS legislation 2.2. Contribute to ensuring that work is undertaken in a safe manner in accordance with relevant OHS legislation, codes, standards and workplace policies and procedures 2.3. Identify and take ***appropriate action*** on non-compliance with OHS legislation, codes, standards, policies and procedures to contribute to achieving compliance 2.4. Recognise limits of own expertise and legal

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ELEMENT	PERFORMANCE CRITERIA
	responsibilities, and access appropriate sources of expertise as required
3. Maintain knowledge of OHS legislation, industry and organisational requirements	3.1. Utilise ***sources*** to access current information covering applicable legislation and guidelines relating to workplace OHS requirements 3.2. Regularly update and communicate information on workplace OHS legislation, codes, standards, policies and procedures relevant to self and other employees

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and interpersonal skills to contribute effectively to formal and informal OHS meetings
- literacy skills to prepare simple documents such as summary reports and memos for a range of target groups including OHS committee, OHS representatives, managers, supervisors.

Required knowledge

- obligations, rights and requirements under relevant OHS legislation and common law as it applies to those involved in OHS
- relevant state/territory and commonwealth OHS legislation, codes of practice and standards
- research and data collection methods to obtain evidence of compliance with OHS legislation.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification and application of the OHS legal and regulatory framework applicable to the candidate's workplace, occupation and industry • knowledge of relevant state/territory and commonwealth OHS legislation, codes of practice and standards.

Context of and specific resources for assessment	Assessment must ensure:
	• access to relevant information and documentation on compliance requirements such as:
	  • organisational policies, standard operating procedures, procedures and plans
	  • relevant legislation, regulations, licensing requirements, codes of practice, standards
	• access to relevant internal and external data files
	• access to appropriate office equipment and resources used in the identification and rectification of OHS compliance breaches.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • review of documents on workplace OHS legislation, codes, standards, policies and procedures relevant developed and communicated to employees • analysis of responses to case studies and scenarios • demonstration of the application of OHS legislation in conducting work safely • oral or written questioning to assess knowledge of research and data collection methods to obtain evidence of compliance with OHS legislation • assessment of duty of care arrangements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

OHS legislation may include:	• legislation relevant to the workplace, occupation and industry, for example, mining safety, electrical legislation
	• relevant commonwealth and state/territory OHS specific acts and regulations such as:
	  • common law
	  • contract law
	  • criminal law
	  • dangerous goods
	  • environmental protection
	  • equal opportunity and anti-discrimination law
	  • industrial relations law
	  • privacy
	  • workers compensation

OHS codes may include:	• codes of practice, developed by legislators or industries that give practical advice on how to comply with legal obligations
OHS standards may include:	• Australian Standards • codes of practice • exposure standards • guidance notes • industry standards • international standards • national standards developed by the Office of the Australian Safety and Compensation Council • regulations and standards developed by OHS regulators
Non-compliance with OHS	• inadequate systems of information, instruction

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RANGE STATEMENT	
legislation, codes, standards, and workplace policies and procedures may include:	training or supervision • plant equipment or substances not maintained, or used or stored in an unsafe condition • poor consultative practices • poor design • workplace hazards not identified or controlled • workplace systems not in place or inadequate
Appropriate actions may include:	• contributing to an OHS audit • contributing to an OHS inspection • contributing to engaging external specialists and consultants • contributing to the identification of non-compliance with OHS legislation in the workplace • contributing to the implementation, monitoring and evaluation of actions to ensure OHS compliance • making recommendations about how compliance with OHS legislation could be achieved • reporting breaches of compliance to responsible persons or authorities • where required, carrying out notes or functions specified in legislation or workplace policies and procedures
Sources may include:	• audits • employer groups • hazard, incident and investigation reports • industry bodies • manufacturers' manuals and specifications • OHS professional bodies • OHS specialists • regulatory authorities • standards, from Australia or overseas • training, information sessions and forums • unions • websites, journals and newsletters

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS302B Participate effectively in OHS communication and consultative processes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to participate in workplace occupational health and safety (OHS) consultative processes. Consultative arrangements, also referred to as participative arrangements, inform those involved in OHS matters, seek their input and provide opportunity for stakeholders to participate in decisions that may impact on the OHS of the workplace. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who assist OHS specialists in relation to OHS issues. Steps to resolve OHS issues are covered in BSBOHS305B Contribute to OHS issue resolution.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Contribute to establishing consultative processes within the workplace	1.1. Apply knowledge of relevant OHS laws, policies and procedures to contribute to the development of ***consultative*** and ***participative OHS arrangements*** in the workplace 1.2. Identify, record and address ***barriers*** to the successful functioning of OHS consultative processes 1.3. Contribute recommendations for those involved in OHS 1.4. Identify and record responsibilities of ***relevant personnel*** in the consultation process
2. Contribute to obtaining and providing information about OHS issues	2.1. Contribute to establishing a systematic approach to managing OHS by using ***systems and procedures*** to gather information on OHS issues 2.2. Utilise ***tools and techniques*** to source information from others about OHS issues and hazards 2.3. Identify and access ***sources of OHS information and data***

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ELEMENT	PERFORMANCE CRITERIA
	2.4. Communicate relevant issues to others using appropriate ***communication methods***
3. Raise OHS issues with others	3.1. Raise relevant OHS issues in meetings and record relevant aspects of discussion in accordance with workplace procedures 3.2. Follow-up outstanding issues from meetings in a timely manner 3.3. Communicate outcomes to others

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to speak, listen, read and write effectively to consult on and present OHS issues
- interpersonal skills to support others to raise OHS issues
- information management skills to store and retrieve relevant documents.

Required knowledge

- roles and responsibilities of OHS personnel
- relevant OHS legislation, codes of practice, agreements, industry standards, workplace policies and procedures
- organisational procedures for information sourcing and dissemination, and available communication channels and methods
- organisational procedures and protocols for record keeping, and information retrieval and management.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • contribution to consultative arrangements for managing OHS in a workplace • knowledge of relevant OHS legislation, codes of practice, agreements, industry standards, workplace policies and procedures.

Context of and specific resources for assessment	Assessment must ensure:
	• access to relevant information on compliance requirements such as:
	  • organisational policies, standard operating procedures, procedures and plans
	  • relevant legislation, regulations, licensing requirements, codes of practice, standards
	• access to relevant internal and external OHS data files
	• access to appropriate office equipment and resources.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of the application of OHS legislation when consulting with people in the workplace on OHS issues • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of roles and responsibilities of OHS personnel • review of records of meeting where OHS issues were raised and discussed • evaluation of communication with others about outcomes of OHS issues raised.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Consultative OHS arrangements may include:	• arrangements to meet workplace consultation obligations specified in relevant state, territory and commonwealth OHS legislation, including:
	  • OHS and other consultative and planning committees
	  • health and safety and other employee representatives such as deputy OHS representatives
	  • employee and supervisor involvement in OHS activities such as inspections and audits
	  • procedures for reporting hazards, raising awareness and addressing OHS issues
	  • employee and workgroup meetings
	• the formal and informal processes in place for the exchange of information and views on OHS hazards, risks and risk controls

Participative OHS arrangements may include processes that:	• inform employees and other stakeholders of OHS matters • seek input and offer the opportunity for stakeholders to participate in decisions that may impact on the OHS of the workplace
Barriers to consultation may include:	• access to technology or information • an unsupportive workplace culture • cultural differences arising from ethnic diversity • geographic dispersal of employees • issues arising around the workplace and specific disabilities • lack of a systematic approach to managing OHS in the workplace

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RANGE STATEMENT	
	• lack of support from key management • language and literacy levels of the workforce • remote locations or worksites • rosters or shift work • unrealistic timeframes

Relevant personnel may include:	• managers and supervisors
	• OHS representatives and committee members
	• OHS specialists such as:
	  • ergonomists
	  • health professionals
	  • injury management advisors
	  • occupational hygienists
	• OHS technical advisors such as:
	  • engineers (design, acoustic, safety, mechanical and civil)
	  • maintenance and tradespeople
	  • safety representatives
	• self
	• unions
	• workplace assessors with experience in language or disability issues

Systems and procedures may include:	• methods of information collection and reporting, including:
	  • surveys
	  • checklists
	  • audits
	  • interviews
	  • inspections
	  • registers
	  • record keeping
	• planning and consultation systems including:
	  • OHS committee
	  • meetings with health and safety representatives
	• written communication systems, such as use of intranet, emails, memos, reports, newsletters

Tools and techniques may include:	• body mapping • employee concerns identified through a hazard reporting system

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RANGE STATEMENT	

	• examination of relevant information and data
	• formal or informal meetings
	• hazard identification checklists
	• interviews with workers
	• job and systems analysis
	• material safety data sheets (MSDSs)
	• plant and equipment maintenance records
	• reviews of:
	  • investigation reports
	  • OHS records
	  • registers of hazardous substances and dangerous goods
	  • reported hazards and incidents
	• surveys and suggestion boxes
	• workplace processes such as 'walk through' surveys and inspections

Sources of OHS information and data may include:	• audits • employer groups • first aid records • hazard, incident and investigation reports • industry bodies • legislation, standards, manufacturers' manuals and specifications available at the workplace • minutes of meetings from incident investigations • MSDSs and registers • OHS professional bodies • OHS specialists • other manufacturers' manuals and specifications • regulatory authorities (for codes of practice, legislation) • reports • standards, from Australia or overseas • unions • websites, journals and newsletters • workplace inspections
Communication methods may include:	• audit and inspection records • emails, memos and other agreed forms of communication

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RANGE STATEMENT	
	• group and individual meetings • presentations • risk registers • using interpreters and translators

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS303B Contribute to OHS hazard identification and risk assessment

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to contribute to occupational health and safety (OHS) hazard identification and risk assessment to promote the maintenance of OHS in the workplace. It includes determining relevant legislation and contributing to any actions to ensure compliance with OHS legislation, codes and standards. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who assist OHS specialists in relation to the identification of workplace hazards and assessment of OHS risks in the workplace.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Contribute to workplace hazard identification	1.1. Contribute to the selection of ***hazard identification tools***, ***techniques***, ***processes and methods*** suitable for the workplace 1.2. Access hazard identification tools, techniques processes and methods to identify hazards in the workplace 1.3. Recognise ***hazards*** in the workplace, report these hazards to designated personnel and record them in accordance with workplace procedures 1.4. Provide information and assistance to ***persons conducting workplace inspections or testing***
2. Gather information about workplace hazards	2.1. Research, collect and record information about OHS hazards and their associated risks 2.2. Seek additional information, expertise or specialist advice from within or external to the workplace when limit of own skills and knowledge is reached 2.3. Conduct a workplace inspection to collect further information about OHS hazards and associated risks if required 2.4. Contribute to the support of OHS practitioners and employees in accessing workplace ***sources of***

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ELEMENT	PERFORMANCE CRITERIA
	information and data regarding hazard identification 2.5. Contribute to the support of OHS practitioners and employees accessing external sources of information and data related to hazard identification, where required
3. Contribute to OHS risk assessment	3.1. Use appropriate ***risk assessment tools*** to contribute to risk assessment 3.2. Identify, categorise and assess risk factors as a contribution to overall risk assessment 3.3. Seek additional information, expertise, or specialist advice to investigate the likelihood and consequence of identified risks 3.4. Document outcomes of the risk assessment process in a ***risk register***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- research skills to investigate the effectiveness of workplace practices and processes, to review workplace practices, processes and data, and to draw relevant inferences
- literacy skills to prepare summary reports and memos for a range of target groups including:
  - employees
  - OHS committees
  - OHS representatives
  - managers
  - supervisors
- organisational and time management skills to sequence tasks and meet timelines
- communication skills to contribute effectively on hazard identification risk assessment processes.

Required knowledge

- appropriate methods for data collection
- basic principles of incident causation and injury processes

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REQUIRED SKILLS AND KNOWLEDGE

• concepts of risks, factors that affect risk and difference between a hazard and a risk
• consequences and likelihood of risks associated with hazards in the workplace
• formal and informal communication processes
• internal and external sources for OHS information and data
• key personnel in the workplace
• legislative requirements for:
  • consultation and communication
  • information and data collection
  • notification of incidents
  • record keeping
  • reporting of incidents
  • specific hazards
• limitations and subjectivity of generic hazard and risk checklists, and risk ranking processes
• nature of workplace processes and hazards relevant to the workplace
• organisational culture as it impacts on the workgroup
• organisational design and structure
• organisational policies and procedures regarding OHS
• relevant state/territory/commonwealth OHS legislation, codes of practice, standards and guidance material
• types and characteristics of major physical, chemical, biological, radiological, nuclear mechanical, psychosocial and environmental hazards which may be present in the workplace
• types of hazard registers.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • collection of information about workplace hazards and contribution to the identification of hazards in a workplace • contribution to a risk assessment for hazards

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EVIDENCE GUIDE	
	identified in the workplace • knowledge of relevant state/territory/ commonwealth OHS legislation, codes of practice, standards and guidance material.

Context of and specific resources for assessment	Assessment must ensure:
	• access to relevant information on compliance requirements such as:
	  • organisational policies, standard operating procedures, procedures and plans
	  • relevant legislation, regulations, licensing requirements, codes of practice, standards
	• access to relevant internal and external data files
	• access to appropriate computer resources needed for the management of identification and rectification of breaches in compliance requirements.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of the application of hazard identification and risk assessment techniques in the workplace • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of consequences and likelihood of risks associated with hazards in the workplace • review of research into OHS hazards and their associated risks • assessment of documentation completed when identifying hazards and assessing risks • evaluation of preparations undertaken to plan how OHS issues will be resolved.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Hazard identification tools, ***techniques***, ***processes and methods*** may include:	• analysis of injury and claims statistics • audits • body mapping • checklists for hazard identification • consultation with workers, clients or other users • identification of employee concerns, such as through a hazard reporting system • input of managers, OHS representatives, OHS committee and others through consultative processes • interviews • investigations • job safety analyses • material safety data sheets (MSDSs) • monitoring and measurement • observation • review of past incidents, incident and hazard reports, hazardous substances and dangerous goods registers, plant and maintenance records • review of research and industry literature • review of technical standards and other information sources • simulations • timelines of actions and events • use of incident models • workplace processes such as 'walk through', surveys and inspections

Hazards may include:	• sources of potential harm in terms of human injury, ill health, damage to property, damage to the environment, or a combination of these, including:
	  • biological
	  • chemical

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RANGE STATEMENT	
	• environment • mechanical and/or electrical • nuclear • physical • psychosocial • radiological

Persons conducting workplace inspections or testing may include:	• employers
	• internal or external consultants
	• OHS specialists and testers such as:
	  • audiologists
	  • ergonomists
	  • health professionals
	  • occupational health professionals
	  • occupational hygienists
	  • safety engineers
	  • safety professionals
	  • toxicologists
	• OHS technical advisors such as:
	  • engineers (design, acoustic, safety, mechanical and civil)
	  • maintenance and tradespeople
	  • safety representatives
	• workplace assessors with experience in language or disability issues

Sources of information may include:	• audits • employer groups • hazard, incident and investigation reports • industry bodies • legislation, standards, manufacturers' manuals and specifications available at the workplace • minutes of meetings from incident investigations • MSDSs and registers • OHS professional bodies • OHS specialists • other manufacturers' manuals and specifications • regulatory authorities (for codes of practice, legislation)

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RANGE STATEMENT	
	• reports • standards, from Australia or overseas • unions • websites, journals and newsletters • workplace inspections

Risk assessment tools may include:	• aids that may be included in:
	  • legislation
	  • codes of practice
	  • standards
	  • guidelines
	  • or other relevant documentation
	• checklists

Risk register may include:	• a list of hazards, their location and the people exposed to them • a range of possible scenarios or circumstances under which these hazards may cause injury or damage • nature of injury or damage that could be caused • results of a risk assessment • possible control measures for implementation

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBOHS304B Contribute to OHS hazard control

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to contribute to controlling occupational health and safety (OHS) hazards in the workplace in order to maintain a healthy and safe workplace. It includes determining relevant legislation and contributing to any actions to ensure compliance with OHS legislation, codes and standards. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who assist OHS specialists in relation to controlling OHS hazards in the workplace.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Contribute to the development of OHS hazard control options	1.1. Apply knowledge of OHS legislation, codes of practice, standards, regulations and workplace policies and procedures to contribute to the development of ***hazard controls*** 1.2. Apply ***principles of the hierarchy of control*** to identified ***hazards*** 1.3. Initiate the use of ***OHS specialists and technical advisors***, where required, to assist in hazard identification and development of hazard controls for areas outside own expertise
2. Contribute to the selection of hazard control options	2.1. Determine the selection of hazard controls with relevant others 2.2. Determine the prioritisation of hazard controls with relevant others 2.3. Provide opportunities for employees to become involved in hazard control options 2.4. Identify and report ***factors impeding successful implementation of selected hazard controls*** 2.5. Provide information about selected hazard controls to stakeholders
3. Contribute to the implementation of hazard controls	3.1. Contribute to obtaining resources required to implement selected hazard controls 3.2. Contribute to the development and documentation of

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ELEMENT	PERFORMANCE CRITERIA
	actions required to implement hazard controls 3.3. ***Communicate with stakeholders*** affected by hazard controls in a timely and clear manner

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication skills to contribute effectively on the selection of hazard controls and the selection of hazard controls
• culturally appropriate communication skills to relate to people with diverse backgrounds and people with diverse abilities and OHS roles in the workplace
• organisational and time management skills to sequence tasks and meet timelines
• literacy skills to prepare summary reports and memos for a range of target groups including:
  • employees
  • OHS committees
  • OHS representatives
  • managers
  • supervisors.

Required knowledge
• codes of practice and standard industry controls for a range of hazards • concept of risk and factors that affect risk • difference between a hazard and a risk • formal and informal communication processes and key personnel related to communication • hazard control options • hierarchy of control and considerations for choosing between different control measures such as possible inadequacies of particular control measures • how the characteristics and composition of the workforce impact on risk • incident investigation procedures • internal and external sources of information about OHS information and data • key personnel in the workplace • limitations of generic hazard and risk checklists and risk ranking processes • nature of workplace processes and hazards relevant to the workplace

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REQUIRED SKILLS AND KNOWLEDGE
• organisational design and structure • organisational policies and procedures regarding OHS • potential effects and likely consequences to people, materials, equipment, work practices and environment if risks associated with OHS hazards in the workplace are realised • principles of incident causation and injury processes • relevant state/territory and commonwealth OHS legislation, codes of practice, standards and guidance material • requirements for individual fitting, use, maintenance and storage of personal protective equipment (PPE) • types and characteristics of major physical, chemical, biological, radiological, nuclear, mechanical, psychosocial and environmental hazards which may be present in the workplace.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • contribution to the development, selection and implementation of OHS hazard control options in a workplace • knowledge of relevant state/territory and commonwealth OHS legislation, codes of practice, standards and guidance material.

Context of and specific resources for assessment	Assessment must ensure:
	• access to relevant information on OHS compliance requirements such as:
	  • organisational policies, standard operating procedures, procedures and plans
	  • relevant legislation, regulations, licensing requirements, codes of practice, standards
	• access to relevant internal and external data files.

Method of assessment	A range of assessment methods should be used to assess

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EVIDENCE GUIDE	
	practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of documentation completed when controlling hazards • demonstration of the application of hazard control techniques • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of requirements for individual fitting, use, maintenance and storage of PPE • review of information provided to stakeholders about selected hazard controls • evaluation of communications with stakeholders affected by hazard controls.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Hazard controls may include:	• actions taken to eliminate hazards entirely
	• actions taken to minimise the risks associated with the hazard by:
	  • substituting another product or process to replace the hazard
	  • isolating the hazard
	  • using engineering controls
	  • improving administrative controls such as

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RANGE STATEMENT	

	changing policies, procedures or providing training
	• using PPE such as:
	  • head protection
	  • face and eye protection
	  • respiratory protection
	  • hearing protection
	  • hand protection
	  • clothing and footwear

Principles of the hierarchy of hazard control include:	• eliminating hazards
	• and where this is not practicable, minimising risk by:
	  • isolating hazard from personnel
	  • substitution
	  • using administrative controls (e.g. procedures, training)
	  • using engineering controls
	  • using PPE

Hazards may include:	• sources of potential harm in terms of human injury or ill health, damage to property, damage to the environment, or a combination of these, including:
	  • physical
	  • mechanical and/or electrical
	  • chemical
	  • biological
	  • psychosocial
	  • radiological
	  • nuclear
	  • environmental

OHS specialists and technical advisors may include:	• employees who have an OHS role and responsibilities
	• OHS specialists and testers such as:
	  • audiologists
	  • ergonomists
	  • health professionals
	  • occupational health professionals
	  • occupational hygienists
	  • safety engineers

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RANGE STATEMENT	

	• safety professionals
	• toxicologists
	• OHS technical advisors such as:
	  • engineers (design, acoustic, safety, mechanical and civil)
	  • maintenance and tradespeople
	  • safety representatives, inspectors and officers
	• workplace assessors with experience in language or disability issues

Factors impeding successful implementation of selected hazard controls may include:	• access to technology or information • an unsupportive workplace culture • cultural differences arising from ethnic diversity • geographic dispersal of employees • issues arising around the workplace and specific disabilities • lack of a systematic approach to managing OHS in the workplace • lack of support from key management • language and literacy • language, literacy and numeracy levels • remote locations or worksites • rosters or shift work • shift work and rostering arrangements • unrealistic timeframes • workplace organisational structures

Communication with stakeholders may include:	• contribution to development of policies and procedures
	• employee meetings
	• interviews and discussions
	• issue resolution meetings
	• memos
	• presentations to:
	  • external investigators
	  • inspectors
	  • consultants
	  • OHS specialists
	  • technical advisors
	• presentations to OHS committees

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RANGE STATEMENT	
	• summary reports • use of participative or consultative processes implemented in the workplace • written and electronic communication

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS305B Contribute to OHS issue resolution

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to contribute to the resolution of occupational health and safety (OHS) issues in the workplace. It includes determining relevant legislation and contributing to any actions to ensure compliance with OHS legislation, codes and standards. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who assist OHS specialists in relation to resolving OHS issues and effectively communicating the outcomes of the issue resolution process to employees.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare for resolution about OHS issues	1.1. Apply knowledge of relevant OHS laws and workplace policies and procedures to the OHS resolution process in the workplace 1.2. Identify, clarify and record OHS issues prior to commencement of issue resolution meetings 1.3. Undertake ***preparations*** to plan how OHS issues will be resolved 1.4. Identify and remove any obstacles that prevent OHS issue discussion in the workplace
2. Contribute to the resolution of OHS issues	2.1. Provide ***support and advice*** to employees about ***issue resolution tools***, ***techniques and strategies*** that can be used to resolve OHS issues 2.2. Participate in the issue resolution process 2.3. Provide support and advice where appropriate to resolve any conflict or disagreement arising from the issue resolution process according to workplace procedures 2.4. Contact ***external bodies*** to initiate OHS dispute resolution processes where appropriate
3. Effectively communicate outcomes of OHS issue resolution	3.1. Research the communication needs of stakeholders 3.2. Communicate issue resolution findings to stakeholders through a variety of ***formal and informal methods***

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ELEMENT	PERFORMANCE CRITERIA
process	3.3. Establish and maintain ***records of OHS issue resolution actions*** and outcomes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to consult and present OHS issues to people from diverse backgrounds and people with diverse abilities • presentation and facilitation skills to represent employees' views on OHS issues • information management skills to store and retrieve relevant documents.
Required knowledge
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • internal and external sources of OHS information and data • legislative requirements for OHS information provision, data collection, consultation and reporting • organisational culture as it impacts on the workgroup • organisational policies and procedures for OHS agreements • organisational skills to run meetings effectively • relevant state/territory and commonwealth OHS legislation, codes of practice, standards and guidance material • roles and responsibilities of personnel under OHS legislation • types of issue resolution tools, techniques and strategies.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • contribution to the resolution of workplace OHS issues in accordance with OHS legislation, and workplace policies and procedures • knowledge of relevant state/territory and commonwealth OHS legislation, codes of practice, standards and guidance material.

Context of and specific resources for assessment	Assessment must ensure:
	• access to relevant information on compliance requirements such as:
	  • organisational policies, standard operating procedures, procedures and plans
	  • relevant legislation, regulations, licensing requirements, codes of practice, standards
	• access to relevant internal and external data files
	• access to appropriate computer resources needed to identify and rectify breaches in compliance requirements.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of documentation completed when contributing to OHS issue resolution • demonstration of the application of issue resolution techniques • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of types of issue resolution tools, techniques and strategies • review of records of OHS issue resolution actions and outcomes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Preparations may include:	• considering the expected response of other parties to proposals • contributing to the development of an alternative proposal • contributing to the selection of tactics, tools and approaches to be used in issue resolution • determining desired outcomes of the issue resolution process • determining with whom the issues should be raised • following policy processes • formulating a proposal to achieve a desired outcome • gathering information on OHS issues • preparing the physical environment in which issue resolution meetings will take place • reading any supporting documentation associated with the OHS issues

Support and advice may include:	• accompanying employees when investigations are being conducted by employers/external investigators
	• engaging the advice of:
	  • external consultants
	  • OHS specialists
	  • other health and safety representatives
	  • unions
	  • workplace assessors with experience in language or disability issues
	• explaining the results of inspections to employees, safety representatives or OHS committee members
	• holding formal meetings with relevant others
	• holding informal discussions with relevant others

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RANGE STATEMENT	
	• interpreting information about OHS inspections to relevant others • providing written summaries, letters, emails, minutes and reports on issue resolution action plans and outcomes
Issue resolution tools, ***techniques***, ***and strategies*** may include:	• anticipating possible outcomes of issue resolution meetings • considering what other parties perceive to be the issues, problems and goals requiring resolution • contributing to identifying appropriate mediation processes and personnel if required • establishing wants and needs from the issue resolution process • gathering information about the decision making authority of people involved in the issue resolution process • gathering knowledge and conducting research to clearly define the issues, problems and goals of issue resolution meetings • recording facts about issues • tabling proposals and solutions at issue resolution meetings • using active listening and responding techniques during issue resolution meetings • working out areas of agreement with parties participating in the issue resolution process
External bodies may include:	• dispute resolution commissions • statutory OHS investigative bodies within the relevant jurisdiction • unions
Formal and informal methods may include:	• giving presentations • participating in group and individual meetings • presenting issue resolution findings to the OHS committee • providing written summaries, letters, emails, memos, minutes and reports • using interpreters and translators
Records of OHS issue resolution actions may include:	• audit and inspection records • meeting minutes • risk registers • written summaries, letters, emails, minutes and

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RANGE STATEMENT	
	reports on issue resolution action plans

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS306B Contribute to implementing emergency prevention activities and response procedures

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to contribute to the implementation of emergency prevention and response procedures. It includes determining relevant legislation and contributing to any actions to ensure compliance with occupational health and safety (OHS) legislation, codes and standards. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who assist OHS specialists in relation to the implementation of emergency prevention and response procedures.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Contribute to implementing emergency prevention activities	1.1. Identify, record and report situations that could lead to ***workplace emergencies*** to the appropriate person 1.2. Contribute to the implementation of ***actions***, ***controls or treatments*** to prevent potential emergency situations from occurring 1.3. Provide information about what an emergency control organisation is and how it operates in the workplace to relevant others 1.4. Communicate ***information about emergency prevention and response plans*** effectively to relevant others
2. Contribute to implementing emergency responses	2.1. Identify and report emergencies to relevant persons according to workplace emergency procedures 2.2. Respond to ***emergency warnings*** and advice according to workplace emergency procedures 2.3. Follow ***instructions*** from ***emergency control response personnel*** 2.4. Perform allocated tasks in emergency situations as outlined in workplace emergency procedures 2.5. Inform relevant others that an emergency is occurring and remind them of their role in the emergency response process

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to communicate effectively about prevention of hazardous circumstances which may lead to emergencies • organisational skills to act in accordance with organisational policies and procedures in emergency situations.
Required knowledge

• basic emergency prevention controls typically installed in a workplace, such as:
  • emergency alerting systems
  • emergency protection systems
  • fire and smoke alarms, and fire extinguishers
  • required safety wear
  • security systems
• enterprise physical site and work areas
• enterprise reporting procedures in an emergency
• essential actions of self and others in an emergency
• hazards and precautions to be taken during an emergency
• internal and external sources of OHS information
• organisational policies and procedures for acting in an emergency situation
• powers of safety representatives and other authorised OHS personnel to cease work immediately if an immediate danger to OHS exists
• relevant state/territory and commonwealth OHS legislation, codes of practice, standards and guidance material
• roles, responsibilities and authority of OHS personnel
• information needs of work unit or work team.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • effective contribution to the implementation of workplace emergency prevention response procedures • knowledge of relevant state/territory and commonwealth OHS legislation, codes of practice, standards and guidance material.

Context of and specific resources for assessment	Assessment must ensure:
	• access to relevant information on OHS requirements such as:
	  • organisational policies, standard operating procedures, procedures and plans
	  • relevant legislation, regulations, licensing requirements, codes of practice, standards.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of documentation completed about emergency responses • demonstration of the application of emergency response techniques in the workplace or simulated environment • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of basic emergency prevention controls typically installed in a workplace • review of information communicated about emergency prevention and response plans to relevant others.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Workplace emergencies may include:	• civil disorder or criminal acts such as robberies and shootings • contamination • emergencies requiring evacuation • explosions and bomb alerts • external emergencies such as flood, cyclone, earthquake, storm and traffic accident impacting on the organisation • fires and explosions • hazardous substances and chemical spills • hostage situations or terrorism • internal emergencies such as loss of power or water supply and structural collapse • security emergencies such as armed robberies, intruders or disturbed persons • serious injury events or medical emergencies
Actions, ***controls or treatments*** may include:	• audits • cessation of work where there is an immediate risk to health and safety • drills for emergency situations • fire or smoke alarms • initiation of responses set out in legislation, workplace policies and procedures • inspections • records of equipment and systems compliance with safety standards • security alarms • training logs and records • visual checks
Information about emergency prevention and response plans may include:	• articles in newsletters • holding informal discussions and meetings • multimedia aids such as videos and digital video discs (DVDs)

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RANGE STATEMENT	
	• posters, leaflets and flyers • raising OHS issues at committee meetings • speaking to individuals and groups
Emergency warnings may include:	• advice from designated personnel • alarms triggered by automatic fire, leak spill or movement detectors • automatic sprinkler systems • closed circuit television (CCTV) • communications equipment • electronic warning devices
Instructions may include:	• ordering the cessation of work • ordering to evacuate the premises or to meet at designated meeting points
Emergency control response personnel may include:	• ambulance • emergency services • fire brigade • hazardous materials response teams (hazmat) • internal emergency response control personnel • internal or external advisors in safety, chemicals, engineering, security and emergency response • OHS personnel or authorities • police • representatives from government departments

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

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Co-requisite units

Co-requisite units		

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BSBOHS307B Participate in OHS investigations

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to participate in occupational health and safety (OHS) investigations. It includes determining relevant legislation and contributing to any actions to ensure compliance with OHS legislation, codes and standards. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who assist OHS specialists in relation to an investigation of an OHS incident in the workplace.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Contribute to OHS data collection relevant to an investigation	1.1. Obtain information from those involved using ***appropriate data collection techniques*** regarding ***actions and events*** leading up to, occurring during or after an incident 1.2. Identify and access ***sources of additional information*** related to an incident 1.3. Engage advice from external sources if required 1.4. Accompany ***investigators*** and provide relevant information during investigations 1.5. Attend meetings about OHS investigations 1.6. Observe investigative testing and provide copies of the results to relevant others
2. Participate in workplace investigations	2.1. Use ***appropriate techniques*** when participating in workplace investigations 2.2. Review reports on safety incidents, injuries and illnesses 2.3. Contact responsible persons and relevant authorities when required 2.4. Communicate recommendations arising from investigations to relevant others

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• information management skills to store and retrieve relevant OHS documents • presentation and consultation skills to communicate OHS issues arising in the workplace • presentation skills to provide information to a wide range of forums.
Required knowledge
• basic principles of incident causation • characteristics, mode of action and units of measurement of major hazard types • formal and informal communication processes and the key personnel related to communication • hierarchy of control and considerations for choosing between different hazard control measures • internal and external sources of OHS information and data • nature of the workplace processes such as work flow, planning and control, and hazards specific to the workplace • organisational culture as it impacts on the workgroup • organisational policies and procedures for OHS • principles and practices of systemic approaches to the management of OHS • principles of ethics related to professional practice • relevant state/territory and commonwealth OHS legislation, codes of practice, standards and guidance material • roles and responsibilities under OHS legislation of employees, supervisors, contractors, designers.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential: • contribution to investigations of OHS issues relating

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EVIDENCE GUIDE	
competency in this unit	to workplace incidents • knowledge of relevant state/territory and commonwealth OHS legislation, codes of practice, standards and guidance material.

Context of and specific resources for assessment	Assessment must ensure:
	• access to relevant OHS information such as:
	  • organisational policies
	  • standard operating procedures and plans
	  • relevant legislation
	  • regulations
	  • licensing requirements
	  • codes of practice
	  • standards
	• access to appropriate office equipment and resources
	• access to relevant internal and external data files.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of documentation completed when contributing to OHS investigations • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of basic principles of incident causation • review of reports on safety incidents, injuries and illnesses • evaluation of communications to relevant others about recommendations arising from investigations.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Appropriate data collection techniques may include:	• accessing information and statistics on accidents and dangerous occurrences • conducting regular, accident or special workplace OHS inspections • engaging the services of an internal or external consultant or specialist OHS practitioner • facilitating the engagement of personnel to conduct specialised testing on hazards in the workplace • investigating workgroup members' complaints thoroughly before presenting them to management or supervisors

Actions and events may include:	• anything that may have contributed to the occurrence or severity of the incident, including design decisions
	• facts about the incident such as:
	  • systems
	  • people
	  • tools
	  • equipment
	  • materials
	  • fixtures
	  • time and nature of any injuries sustained

Sources of additional information may include:	• booklets and publications from statutory authorities • manufacturers' manuals, specifications and instructions • OHS consultation and participation processes • OHS legislation, codes of practice, industry standards and guidelines • OHS related websites • records about hazards identified in the workplace • records about previous actions taken to control

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RANGE STATEMENT	
	hazards • records of risk assessments • • rights and responsibilities of those involved in OHS in the workplace • safe work procedures • workplace OHS policies, procedures and agreements
Investigators may include:	• employer representatives, managers and supervisors • external consultants • inspectors from statutory OHS investigative bodies or authorities • internal OHS specialists • OHS representatives conducting workplace investigations for issues raised in the workplace
Appropriate techniques may include:	• examination of relevant information and data • inspections • interviews • simulations • timelines of actions and events

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

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Co-requisite units

Co-requisite units		

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BSBOHS401B Contribute to the implementation of a systematic approach to managing OHS

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively contribute to the application of a systematic approach to managing occupational health and safety (OHS) to ensure that the workplace is, as far as is practicable, safe and without risks to the health of employees and others. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with supervisory responsibilities for implementing and monitoring the organisation's OHS policies, procedures and programs in a work area. It includes contributing to the implementation of developed strategies, systems and plans, as well as recognising the need for expert advice. The unit may apply both in a work unit of a large organisation or in a small to medium enterprise.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Contribute to the implementation of information and data systems	1.1. Identify and address ***requirements for record keeping*** 1.2. Identify, access and evaluate ***sources of OHS information and data*** for application in the workplace 1.3. Take actions to ensure that records are accurately completed, collected and stored 1.4. Provide information and data to managers and stakeholders in a readily understood format 1.5. Monitor and evaluate the effectiveness of recordkeeping actions taken
2. Contribute to the implementation of OHS strategies, systems and plans	2.1. Determine OHS priorities in consultation with appropriate managers and in line with other ***consultative arrangements*** in the workplace 2.2. Develop ***OHS action plans*** taking account of priorities 2.3. Identify and document OHS training needs

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ELEMENT	PERFORMANCE CRITERIA
	2.4. Monitor action plans for achievement, and update as required 2.5. Seek input from ***OHS specialists*** and ***technical advisors*** if required
3. Support integration of OHS within the overall management approach	3.1. Identify ***other functional areas*** that impact on OHS 3.2. Implement strategies for addressing these impacts 3.3. Work with managers and stakeholders as appropriate to implement OHS action plans
4. Identify OHS implications of proposed changes to the workplace and provide advice to control risks	4.1. Evaluate ***proposed changes to the workplace*** for OHS implications 4.2. Identify resulting hazards and assess potential risks 4.3. Provide appropriate advice to control risks and action as appropriate
5. Identify implications of all sources of change to managing OHS and provide advice regarding those changes	5.1. Identify and evaluate changes to relevant legislation for implications for managing OHS 5.2. Identify and evaluate changes to relevant standards or industry practice for implications for managing OHS 5.3. Monitor sources of information and data for impact on hazards, risks and the management of OHS 5.4. Provide appropriate advice to address impact of change
6. Evaluate effectiveness of the approach to managing OHS	6.1. Access sources of external and internal OHS information and data as part of evaluation 6.2. Identify the need for any external input to evaluation and action as appropriate 6.3. Consult ***stakeholders*** for input to the evaluation 6.4. Identify, document and action areas for improvement

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse

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REQUIRED SKILLS AND KNOWLEDGE
backgrounds and people with diverse abilities at all levels of the organisation • interpersonal skills to consult on and negotiate the development, implementation and monitoring of OHS actions • organisational and time management skills to sequence tasks and meet timelines • research and data analysis skills to evaluate relevant workplace OHS data trends and to recognise limitations of data collected • observation skills to investigate the interactions between people, their activities, environment and systems • numeracy skills to carry out simple calculations and to produce graphs about OHS activities • technology skills to use a range of software and office equipment to access internal and external data on OHS • conflict management and resolution skills to address small disputes relating to OHS implementation issues • interpersonal skills to build relationships with stakeholders (internal and external to the organisation).
Required knowledge

• internal and external sources of OHS information and data
• organisational policies and procedures for OHS
• legislative requirements for:
  • consultation
  • information and data collection
  • notification of incidents
  • record keeping
  • reporting of incidents
• principles and practices of systematic approaches to managing OHS
• principles relating to:
  • hazard identification
  • hierarchy of control
  • risk management
  • systematic approaches to OHS
• range of communication strategies to communicate effectively with people at all levels of the organisation
• relevant state/territory and commonwealth OHS legislation, codes of practice and standards
• roles and responsibilities of personnel as specified in relevant OHS legislation.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • contribution to the implementation of a systematic approach to managing OHS • knowledge of relevant state/territory and commonwealth OHS legislation, codes of practice and standards.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to relevant legislation, standards, codes of practice and guidelines • access to workplace documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques used to manage OHS in the workplace • demonstration of the application of OHS legislation in implementing a systematic approach to managing OHS • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of principles relating to: hazard identification, hierarchy of control, risk management, systematic approaches to OHS • review of OHS action plans, documented OHS training needs and documented action areas for improvement.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

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EVIDENCE GUIDE	
	• other OHS units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Requirements for record keeping may include:	• OHS legislation and regulations governing reporting of incidents and maintenance of records related to specific hazards, including:
	  • chemical registers
	  • material safety data sheets (MSDSs)
	• organisational procedures
	• privacy legislation

Sources of OHS information and data may include:	• consultants • employees • government departments/agencies including OHS authorities and organisations such as the Office of the Australian Safety and Compensation Council • industry networks and associations • internet sites • manufacturers' manuals and specifications • newspapers and journals, trade/industry publications • OHS and other relevant legislation • OHS specialists • technical data
Consultative arrangements may include:	• employee and supervisor involvement in OHS activities, such as inspections and audits • employee and workgroup meetings • health and safety and other employee representatives • OHS and other consultative and planning committees

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RANGE STATEMENT	
	• procedures for reporting hazards, and raising and addressing OHS issues
OHS action plans may include:	• documented plans developed within the workplace to implement OHS management, which allocate responsibilities and timeframes • OHS performance indicators for the organisation or enterprise
OHS specialists may include:	• ergonomists • occupational hygienists • health professionals • injury management advisors • people internal or external to the organisation
Technical advisors may include:	• engineers (such as design, acoustic, safety, mechanical and civil) • legal practitioners • maintenance and tradespeople • workplace trainers and assessors

Other functional areas may include:	• parts of the organisation or grouped responsibilities:
	  • engineering and maintenance
	  • environmental management
	  • finance and auditing
	  • human resources, personnel management/industrial relations
	  • information, data and records management
	  • logistics
	  • purchasing procurement and contracting
	  • quality management

Proposed changes to the workplace may include:	• changes to management practices • changes to the work environment • changes to work practices and conditions • changes to work processes and systems • introduction of contracting arrangements or other changes to work organisation • introduction of new and emerging technology • material purchases • organisational restructure • other labour market changes • plant and equipment purchases

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RANGE STATEMENT	
Stakeholders may include:	• community • employees • health and safety, and other employee representatives • managers • OHS committees • supervisors

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS402B Contribute to the implementation of the OHS consultation process

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to contribute to the promotion of consultative arrangements in the workplace by communicating, influencing and consulting as part of a systematic approach to managing occupational health and safety (OHS). No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with supervisory responsibilities for implementing and monitoring the organisation's OHS policies, procedures and programs in a work area. It addresses the formal and informal processes of ensuring people in the organisation are informed about OHS and have opportunities to effectively participate in OHS processes. This unit will involve working with individuals and working with groups.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Contribute to procedures to raise OHS issues or request information and data	1.1. Identify ***strategies and tools*** for individuals or groups to raise OHS issues or request information and data 1.2. Implement and communicate to ***stakeholders*** and ***interested parties*** procedures for individuals and groups to raise OHS issues or request information and data 1.3. Identify ***barriers*** to individuals or groups seeking OHS information and data or raising issues 1.4. Make recommendations to address any identified barriers
2. Contribute to procedures for communicating OHS information and data	2.1. Identify with stakeholders, needs for ***OHS information and data***, communication and consultation, including relevant ***legislative requirements***

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ELEMENT	PERFORMANCE CRITERIA
	2.2. Provide information and data about OHS to key personnel on a regular basis, in a readily accessible manner and appropriate to the target group 2.3. Use formal and informal ***communication processes*** to provide information and data about OHS 2.4. Identify any barriers to individuals or groups gaining information and data about OHS 2.5. Make recommendations to address any identified barriers 2.6. Monitor and evaluate the effectiveness of actions taken to remove barriers to individuals or groups accessing information and/or data about OHS
3. Communicate OHS information, data and advice effectively to influence management decision making and action	3.1. Provide timely and appropriate OHS information, data and advice to stakeholder groups and individuals 3.2. Make OHS-related contributions in the form of ideas, information and solutions to influence management decision making and action 3.3. Use awareness of the organisation's cultural and industrial environments when dealing with OHS issues
4. Contribute to maintaining OHS arrangements	4.1. Provide support and advice to those involved in ***OHS consultative arrangements*** 4.2. Support the OHS issue resolution process to facilitate timely and equitable resolution of OHS issues 4.3. Facilitate OHS consultative processes to meet legislative and workplace requirements 4.4. Monitor the effectiveness of OHS consultative and participative arrangements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• conflict management skills to address small disputes relating to OHS implementation issues

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REQUIRED SKILLS AND KNOWLEDGE
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities across all levels of an organisation • interpersonal skills to establish and build relationships with internal and external stakeholders • literacy skills to prepare reports for a range of target groups • organisational and time management skills to sequence tasks, meet timelines and run efficient formal and informal meetings • technology skills to use a range of communication media.
Required knowledge

• internal and external sources of OHS information and data
• organisational policies and procedures for OHS
• legislative requirements for:
  • consultation and communication
  • information and data collection
  • notification of incidents
  • record keeping
  • reporting of incidents
• organisational policies and procedures for managing OHS in the workplace
• principles and practices of systematic approaches to managing OHS
• principles relating to:
  • hazard identification
  • hierarchy of control
  • risk management
  • systematic approaches to OHS
• range of communication strategies to communicate effectively with people at all levels of the organisation
• relevant state/territory and commonwealth OHS legislation, codes of practice and standards
• roles and responsibilities of personnel as specified in relevant OHS legislation
• sources of OHS data.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development and use of a product or products when contributing to the implementation of OHS processes • knowledge of relevant state/territory and commonwealth OHS legislation, codes of practice and standards.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to relevant legislation, standards, codes of practice and guidelines • access to workplace documentation access to workplace documentation and personnel.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques used to manage OHS in the workplace • demonstration of the application of OHS legislation in implementing a systematic approach to managing OHS • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • observation of implementation of consultative techniques • observation of presentations • oral or written questioning to assess knowledge of communication strategies used to communicate effectively with people at all levels of the organisation • review of recommendations made to address any barriers to people raising OHS issues or requesting information and data • evaluation of support and advice provided to people involved in OHS consultative arrangements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

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EVIDENCE GUIDE	
	• other OHS units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Strategies and tools may include:	• employee meetings • hazard alerts • informal discussions with team members • input to safety audits, hazard identification and risk assessment processes • intranet or email systems • meetings with health and safety, and employee representatives • OHS committees • suggestion boxes and processes • surveys, checklists • toolbox meetings
Stakeholders may include:	• employees • health and safety, and other employee representatives • managers • OHS committees • supervisors
Interested parties may include:	• clients • community • contractors • visitors
Barriers may include:	• contractual arrangements • language • literacy and numeracy • shift work and rostering arrangements • specific needs of employees

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RANGE STATEMENT	
	• timing of information provision • workplace culture related to OHS • workplace organisational structures (for example geographic, hierarchical)
OHS Information and data may include:	• access to training information and data • hazards that exist in the workplace • manufacturers' manuals and specifications • OHS consultation and participation processes • OHS legislation, codes of practice and guidelines • rights and responsibilities • risk assessments • risk control strategies • safe work procedures • workplace OHS policies and procedures
Legislative requirements may include:	• freedom of information (FOI) legislation • OHS legislation, regulations and codes of practice • workplace equity, diversity and privacy legislation
Communication processes may include:	• audio-visual media, for example video • emails, letters, minutes, memos, reports • group and individual meetings • interviews • newsletters • noticeboards • photographs, maps and plans • signs, posters and brochures
OHS consultative arrangements may include:	• employee and supervisor involvement in OHS activities such as inspections and audits • employee and workgroup meetings • health and safety representatives, and other employee representatives • OHS and other consultative and planning committees • procedures for reporting hazards, and raising and addressing OHS issues

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS403B Identify hazards and assess OHS risks

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify hazards and to assess occupational health and safety (OHS) risks in the workplace. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with supervisory responsibilities in managing OHS in the workplace who identify hazards and assess risks using developed processes and tools. The unit also introduces basic incident analysis as an important skill underlying incident investigation, which is addressed in greater complexity in BSBOHS508B Participate in the investigation of incidents.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Investigate incidents for prevention	1.1. Select and use ***appropriate techniques*** to investigate ***incidents*** 1.2. Establish ***actions and events*** leading up to an incident, during an incident and through the post incident management phase 1.3. Analyse incident to identify the ***hazard/s*** 1.4. Analyse incident to identify intervention points to prevent re-occurrence
2. Access existing sources of information and data to identify hazards	2.1. Review ***workplace sources of information and data*** to access information and data, and to assist in identifying hazards 2.2. Access ***external sources of information and data*** as required 2.3. Seek input from ***stakeholders***, ***key personnel*** and ***OHS specialists***
3. Conduct hazard	3.1. Seek formal and informal ***techniques and tools*** to

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ELEMENT	PERFORMANCE CRITERIA
identification	identify hazards 3.2. Select and modify a suitable technique/tool as appropriate to identify hazards 3.3. Review hazard identification techniques and tools in consultation with workers in the area, and OHS specialists if required, to ensure they are suitably comprehensive 3.4. Utilise techniques and tools and other appropriate ***hazard identification procedures*** to identify hazards 3.5. Provide employees and their representatives with an opportunity to participate in workplace hazard identification
4. Assess risk	4.1. Select and use a ***risk assessment tool*** to identify key factors contributing to risk 4.2. Apply workplace sources of information and data to evaluate the effectiveness of risk controls 4.3. Prioritise risks considering the severity and likelihood of the consequences 4.4. Involve stakeholders and key personnel in risk assessment 4.5. Document the method of risk assessment
5. Participate in implementation process	5.1. Maintain a ***hazard register*** relevant to the workplace 5.2. Identify the level of authority within the organisation to address the risk/s 5.3. Document and communicate outcomes of hazard identification and risk assessments to key personnel and stakeholders 5.4. Monitor and evaluate the effectiveness of own performance in identifying hazards and conducting risk assessments

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities across all levels of an organisation

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REQUIRED SKILLS AND KNOWLEDGE
• information management skills to evaluate OHS data • interpersonal skills to establish rapport and to build networks with a range of internal and external stakeholders • organisational and time management skills to sequence tasks and meet timelines • research and data analysis skills to evaluate interactions between employees, their activities, equipment, environment and work systems • technology skills to access internal and external OHS data.
Required knowledge

• basic principles of incident causation and injury processes
• legislative requirements for:
  • consultation and communication
  • information and data collection
  • notification of incidents
  • record keeping
  • reporting of incidents
  • specific hazards
• organisational culture as it impacts on the workgroup
• organisational policies and procedures for managing OHS
• organisational work processes for managing OHS
• appropriate data collection methods for OHS issues
• concepts of risks, factors that affect risk and difference between a hazard and a risk
• internal and external sources for OHS information and data
• principles and practices of systematic approaches to managing OHS
• principles, tools and techniques to identify and control workplace hazards and to manage risks in the OHS context
• relevant state/territory and commonwealth OHS legislation, codes of practice and standards
• roles and responsibilities of personnel as specified in relevant OHS legislation
• sources of OHS data.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification, analysis and evaluation of multiple workplace hazards using appropriate techniques an tools in a workplace • knowledge of relevant state/territory and commonwealth OHS legislation, codes of practice and standards.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual or simulated workplace • access to office equipment and resources • access to relevant legislation, standards and guidelines • access to relevant OHS documentation and records.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques used to identify, analyse and evaluate OHS hazards and risks • demonstration of the application of OHS legislation in conducting hazard identification and risk management activities • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of concepts of risks, factors that affect risk and difference between a hazard and a risk • review of techniques/tools used to identify hazards • evaluation of a risk assessment tools selected and used to identify key factors contributing to risk • review of risk prioritisation • review of hazard register.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS404B Contribute to the implementation of strategies to control OHS risk.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Appropriate techniques may include:	• examination of relevant information and data • inspections • interviews • simulations • timeline of actions and events • use of accident models

Incidents may include:	• an event resulting in or having a potential for:
	  • injury
	  • ill health
	  • damage
	  • or loss

Actions and events may include:	• all actions and events that may have contributed to the occurrence or severity of the incident, including:
	  • design decisions
	  • systems
	  • people
	  • tools
	  • equipment
	  • materials
	  • fixtures
	  • time and nature of the injury

Hazard/s may include:	• sources or situations with a potential for harm in terms of:
	  • injury
	  • ill health
	  • damage to property
	  • damage to the environment
	  • or a combination of the above

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RANGE STATEMENT	
Workplace sources of information and data may include:	• audits • hazard, incident and investigation reports • incident investigations • legislation, standards, manufacturers' manuals and specifications available at the workplace • material safety data sheets (MSDSs) and registers • minutes of meetings • reports • workplace inspections
External sources of information and data may include:	• employer groups • industry bodies • OHS professional bodies • OHS specialists • Australian Standards • manufacturers' manuals and specifications • regulatory authorities (for other relevant legislation such as acts, regulations, codes of practice) • unions • websites, journals and newsletters
Stakeholders may include:	• community • employees • health and safety, and other employee representatives • managers • OHS committees • supervisors
Key personnel may include:	• managers from other areas • people involved in OHS decision making or who are impacted by decisions
OHS specialists may include:	• ergonomists • health professionals • injury management advisors • occupational hygienists
Techniques and tools may include:	• body mapping • hazard identification procedures based on checklists • interviews • MSDSs

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RANGE STATEMENT	
	• workplace processes such as 'walk throughs', surveys and inspections

Hazard identification procedures may include:	• identifying employee concerns, such as through a hazard reporting system
	• input of managers, OHS representatives, OHS committee and others through consultative processes
	• job and work system analysis (JSA)
	• reviews of:
	  • hazard and incident reports
	  • investigations
	  • OHS records
	  • plant and equipment maintenance records
	  • registers of hazardous substances and dangerous goods

Risk assessment tools may include:	• checklists • matrix nomograms • codes of practice • standards • guidelines
Hazard register may include:	• a list of hazards • location of hazards • range of possible scenarios or circumstances under which hazards may cause injury or damage • results of a risk analysis related to the hazards

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

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Co-requisite units

Co-requisite units		

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BSBOHS404B Contribute to the implementation of strategies to control OHS risk

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to contribute to the implementation of strategies to control occupational health and safety (OHS) risks. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with supervisory responsibilities for managing OHS in the workplace who contribute to the implementation of OHS risk controls in the workplace.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop option/s for risk control	1.1. Review ***hazard register***, outcomes of incident investigations and risk assessments to identify ***hazards*** requiring control action 1.2. Apply knowledge of OHS legislation and standards to develop a range of options to control specific ***risks*** in the workplace 1.3. Apply the ***principles of the hierarchy of control*** when developing risk control options 1.4. Seek input from ***stakeholders*** and ***key personnel*** 1.5. Seek advice from ***OHS specialists*** and ***technical advisors*** where required
2. Select appropriate option/s to control risks	2.1. Review outcomes of risk assessments to inform the process of selecting option/s to control risks 2.2. Prioritise appropriate interventions when selecting risk controls 2.3. Identify potential ***factors that may limit effectiveness of controls*** 2.4. Consult with and involve workplace stakeholders in selecting appropriate control options 2.5. Communicate recommendations for risk control to stakeholders
3. Contribute to implementation of	3.1. Seek appropriate authority and relevant resources to implement controls

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ELEMENT	PERFORMANCE CRITERIA
controls	3.2. Identify and document ***actions required to achieve change*** 3.3. Consult with and involve workplace stakeholders in implementation of change 3.4. Provide advice on the fitting, use, maintenance and storage of ***personal protective equipment*** (PPE)
4. Contribute to monitoring and evaluation of effectiveness of controls	4.1. Monitor and evaluate the extent of change as a consequence of new controls, in consultation with stakeholders 4.2. Monitor and document compliance with new procedures 4.3. Access ***workplace sources of information and data*** to evaluate effectiveness of risk controls and to check for new hazards introduced as a result of controls 4.4. Identify areas for further improvement in consultation with stakeholders and action as appropriate 4.5. Develop and document an improvement plan

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- consultation and negotiation skills to develop risk management plans and implement risk controls effectively
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities across all levels of an organisation
- evaluation skills to analyse the effectiveness of own performance in implementing strategies chosen to control OHS risks
- information management skills to evaluate OHS data
- interpersonal skills to establish rapport and build networks with a range of internal and external stakeholders
- literacy skills to prepare reports for a range of target groups
- organisational and time management skills to sequence tasks and meet timelines
- research and data analysis skills to assess resources required to systematically manage OHS and to analyse relevant workplace information and data

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REQUIRED SKILLS AND KNOWLEDGE
• research and data analysis skills to evaluate interactions between employees, their activities, equipment, environment and work systems • technology skills to access internal and external OHS data.
Required knowledge

• appropriate data collection methods for OHS purposes
• characteristics, mode of action and measurement of major hazard types
• concepts of risks, factors that affect risk and difference between a hazard and a risk
• internal and external sources for OHS information and data
• legislative requirements for:
  • consultation and communication
  • information and data collection
  • notification of incidents
  • record keeping
  • reporting of incidents
  • specific hazards
• organisational culture as it impacts on the workgroup
• organisational policies and procedures for managing OHS
• organisational work processes and structure
• principles and practices of systematic approaches to managing OHS
• principles of incident causation and injury processes
• principles of the hierarchy of control
• principles, tools and techniques to identify and control workplace hazards and manage risks in the OHS context
• relevant state/territory and commonwealth OHS legislation, codes of practice and standards
• requirements for individual fitting, use, maintenance and storage of a range of PPE items
• roles and responsibilities of personnel as specified in relevant OHS legislation
• sources of OHS data
• standard industry controls for a range of hazards.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • contribution to the development and implementation of risk control options to control risks associated with hazards in the workplace or simulated environment • contribution to the monitoring and evaluation of the effectiveness of risk controls implemented and the making of appropriate adjustments where necessary • knowledge of the principles of the hierarchy of control.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to relevant legislation, standards and guidelines • access to workplace documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques used to select, implement, monitor and evaluate risk controls • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • observation of the application of risk control techniques • oral or written questioning to assess knowledge of the principles, tools and techniques to identify and control workplace hazards and manage risks in the OHS context • review of communication to stakeholders of recommendations for risk control • review of documented compliance with new procedures • evaluation of improvement plan.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS403B Identify hazards and assess OHS

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EVIDENCE GUIDE	
	risks.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Hazard register may include:	• a list of hazards • location of hazards • range of possible scenarios or circumstances under which hazards may cause injury or damage • results of the risk analysis related to the hazards

Hazards may include:	• sources of potential harm in terms of human injury, ill health, damage to property, damage to the environment, or a combination of these, including:
	  • biological
	  • chemical
	  • environment
	  • mechanical and/or electrical
	  • physical
	  • psychosocial
	  • radiological
	  • nuclear

Risks may include:	• the chance of something occurring that will result in injury or damage measured in terms of consequences (injury or damage) and likelihood of the consequence
Principles of the hierarchy of control may include:	• eliminating hazards • and where this is not practicable, minimising risk by: • substitution

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RANGE STATEMENT	
	• isolating hazard from personnel • using engineering controls • using administrative controls (such as procedures, training) • using PPE
Stakeholders may include:	• community • employees • health and safety, and other employee representatives • managers • OHS committees • supervisors
Key personnel may include:	• managers from other areas • people involved in OHS decision making or who are impacted by decisions
OHS specialists may include:	• ergonomists • health professionals • injury management advisors • occupational hygienists
Technical advisors may include:	• engineers (design, acoustic, safety, mechanical, civil) • legal practitioners • maintenance and tradespeople • workplace trainers and assessors
Factors that may limit effectiveness of controls may include:	• cultural diversity • language • literacy and numeracy • shift work and rostering arrangements • training required • workplace culture related to OHS, including commitment by managers and supervisors, and compliance with procedures and training • workplace organisational structures (for example geographic, hierarchical)
Actions required to achieve change may include:	• development of new procedures or revision of existing procedures • purchase of equipment or modification of equipment • training
Personal protective equipment	• equipment designed to be worn by a person to

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RANGE STATEMENT	
may include:	provide protection from hazards such as: • clothing and footwear • face and eye protection • hand protection • head protection • hearing protection • respiratory protection
Workplace sources of information and data may include:	• audits • Australian Standards • hazard and incident reports • incident investigations • manufacturers' manuals and specifications • material safety data sheets (MSDSs) and registers • minutes of meetings • OHS legislation • reports • workplace inspections

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBOHS405B Contribute to the implementation of emergency procedures

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to contribute to the implementation of planning and response procedures for emergencies. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with supervisory responsibilities for managing occupational health and safety (OHS) in the workplace who contribute to the implementation of procedures for responding to emergencies. The unit assumes that expert advice will be available in identifying potential emergencies and in formulating the response plans. As the unit focuses on implementation of procedures already developed for short term emergency responses, it is less complex than BSBOHS508B Participate in the investigation of incidents, which has a greater scope both in situations addressed and the timeframe for action. Contributions to the actions to control OHS risks are covered in BSBOHS404B Contribute to the implementation of strategies to control OHS risk.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify potential emergencies	1.1. Apply knowledge of OHS ***hazards*** and ***standards*** to identify causes of potential ***emergencies*** 1.2. Seek input of ***stakeholders*** in identifying potential emergencies 1.3. Identify and liaise with appropriate ***specialist advisors*** and ***emergency agencies*** to identify causes of potential emergencies 1.4. Develop a ***risk register*** to identify potential emergencies and their causes
2. Identify options for initial response	2.1. Categorise major types of emergencies 2.2. Identify actions required to contain or limit potential emergencies 2.3. Identify actions required to limit impact on

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ELEMENT	PERFORMANCE CRITERIA
	personnel, property and the environment 2.4. Identify requirements for liaison with emergency agencies 2.5. Prioritise actions to be taken during emergencies
3. Plan initial response procedures	3.1. Identify ***resources*** available and required for immediate response 3.2. Check ***emergency equipment*** to ensure serviceability, accessibility, cleanliness and correct location 3.3. Document actions required for a number of major types of emergency, taking account of standards, current industry practice, specialist advice and input by emergency agencies 3.4. Identify training needs and appropriate providers
4. Implement initial response procedures	4.1. Document and display actions for initial response 4.2. Understand and implement own role in emergency response
5. Contribute to post event activities	5.1. Identify and support other personnel in the ***second response phase*** 5.2. Make contributions to debriefing processes
6. Monitor emergency response and address deficiencies	6.1. Monitor responses to emergencies for efficiency and timeliness, in consultation with stakeholders and, as appropriate, specialist advisors and agencies 6.2. Document, and promptly and appropriately report results of monitoring to managers and key personnel 6.3. Identify areas for organisational and personal improvement and make recommendations for improvement in response to analysis of response taken

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities across all levels of an organisation

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REQUIRED SKILLS AND KNOWLEDGE

- interpersonal skills to issue instructions in an authoritative manner during unusual circumstances
- literacy skills to prepare reports for a range of target groups
- observation skills to evaluate the impact characteristics and composition of the workforce have on managing OHS
- organisational and time management skills to sequence tasks and meet timelines
- research and data analysis skills to assess resources required to systematically manage OHS and to analyse relevant workplace information and data
- research and data analysis skills to evaluate interactions between employees, their activities, equipment, environment and work systems
- technology skills to access internal and external OHS data.

Required knowledge

- basic emergency prevention controls typically installed in a workplace, such as:
  - emergency alerting systems
  - emergency protection systems
  - fire and smoke alarms, and fire extinguishers
  - required safety wear
  - security systems
- emergency alerting systems and signals used in the workplace and their meanings
- enterprise physical site and work areas
- enterprise reporting procedures in an emergency
- essential actions of self and others in an emergency
- hazards and precautions to be taken during an emergency
- hazards arising from evacuation
- information needs of emergency response personnel during reporting, arrival and response to an emergency
- OHS information needs of work unit or work team
- internal and external sources of OHS information and data
- organisational policies and procedures for OHS and acting in an emergency situation
- organisational structure, roles and responsibilities
- powers of safety representatives and other authorised OHS personnel to cease work immediately if an immediate danger to OHS exists
- principles and priorities for evacuation, checking and accounting for people
- principles of fire protection and emergency response
- relevant state/territory and commonwealth OHS legislation, codes of practice, associated standards and guidance material
- roles, responsibilities and authority of OHS personnel
- types of emergency responses typically used in workplaces.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification of a potential emergency • contribution to the implementation of procedures for preparing and responding to an emergency • evaluation of the effectiveness of the implementation strategies • knowledge of basic emergency prevention controls typically installed in a workplace.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to workplace documentation and actual workplaces.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of procedures implemented in response to an emergency situation • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of information needs of emergency response personnel during reporting, arrival and response to an emergency • review of risk register developed to identify potential emergencies and their causes • written examples of reports on responses to emergency situations • review of documentation submitted to managers and key personnel outlining monitoring of emergency response.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS403B Identify hazards and assess OHS risks • BSBOHS404B Contribute to the implementation of strategies to control OHS risk.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Hazards may include:	• sources of potential harm in terms of human injury, ill health, damage to property, damage to the environment, or a combination of these, including:
	  • biological
	  • chemical
	  • environment
	  • mechanical and/or electrical
	  • physical
	  • psychosocial
	  • radiological
	  • nuclear

Standards may include:	• Australian Standards • industry-specific standards • international standards

Emergencies may include:	• emergencies requiring evacuation
	• explosion and bomb alerts
	• external emergencies and natural disasters, such as:
	  • flood
	  • storm

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RANGE STATEMENT	
	• traffic accident • fire • explosion • hazardous substance spill • chemical spill • internal emergencies, such as: • loss of power • loss of water supply • structural collapse • security emergencies, such as: • armed robberies • intruders • disturbed persons • serious injury events
Stakeholders may include:	• community • employees • health and safety, and other employee representatives • managers • OHS committee • supervisors
Specialist advisors may include:	• internal or external advisors in: • safety • chemicals • engineering • security • emergency response
Emergency agencies may include:	• fire • police • ambulance • government departments • hazardous materials response teams (Hazmat) • OHS authorities
Risk register may include:	• lists of hazards • location of hazards • range of possible scenarios or circumstances under which an emergency could occur,

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RANGE STATEMENT	
	including natural disasters • outcomes of any risk assessment or risk ranking
Resources may include:	• emergency response personnel and equipment • first aid personnel and equipment • emergency services personnel
Emergency equipment may include:	• clothing items such as coloured hats and vests • communication equipment • evacuation alarms • evacuation equipment, especially for people with a disability • fire extinguishers and equipment • torches
Second response phase may include:	• actions required if building cannot be re-occupied • containment of personnel in evacuation area • first aid • support/counselling of personnel involved or affected

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBOHS406C Use equipment to conduct workplace monitoring

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to accurately use equipment to contribute to the monitoring of agents and/or conditions in the workplace including, but not be limited to noise, vibration, light, fibres, dusts, fumes, mists, heat and humidity, radiation, and biological agents such as insects, mites and bacteria. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who contribute to the monitoring of agents and/or conditions in the workplace by using a range of measuring devices to identify hazards, assess risk and monitor the effectiveness of risk controls. Measurement of ergonomic factors and their impact on the human body has been excluded from this unit. This unit does not extend to interpreting results and developing control measures based on the outcomes of the monitoring, as this is addressed in BSBOHS404B Contribute to the implementation of strategies to control OHS risk.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Select measuring device/s	1.1. Identify ***agent and/or condition*** to be measured through consultation with workplace and affected parties 1.2. Identify ***characteristics*** of agent and/or condition 1.3. ***Define area*** where measurements are to be taken 1.4. Identify types of appropriate measuring equipment 1.5. Select measuring equipment appropriate to the agent and/or condition, the environment, the activities being carried out and the level of risk 1.6. Recognise limits of own expertise and available equipment, and seek expert advice and equipment as appropriate
2. Prepare to collect workplace	2.1. Identify any ***regulatory requirements and/or***

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ELEMENT	PERFORMANCE CRITERIA
information and data	***standards*** that impact on the measuring process 2.2. Define ***a sampling process*** 2.3. Make arrangements with the workplace to collect ***information and data*** including advising those involved in workplace activities of any requirements 2.4. Define sampling plan after inspecting area, and in consultation with employees and affected parties regarding the nature of the problem 2.5. Check ***operability of equipment***
3. Use devices to collect workplace information and data	3.1. Select and calibrate monitoring equipment, and select appropriate scale 3.2. Conduct tests or practice using equipment or tests 3.3. Use and maintain equipment correctly to accurately collect information and data 3.4. Address own occupational health and safety (OHS) while collecting information and data 3.5. Collect information and data, and record readings utilising professional evaluation and advice as appropriate 3.6. Dismantle and clean equipment and parts or dispose of appropriately 3.7. Correctly store equipment or make ready for re-use as appropriate
4. Document and evaluate results of monitoring	4.1. Interpret and evaluate results against a recognised standard, and document results 4.2. Address, in the report, any regulatory requirements and consider ***purpose of report*** and the ***target audience*** 4.3. Present ***required information and data*** clearly and logically 4.4. Retain and store results and records in a format that enables them to be readily retrieved in accordance with regulatory requirements and/or standards

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE

Required skills

- literacy skills to prepare reports for a range of target groups
- organisational and time management skills to sequence tasks and meet timelines
- research and data analysis skills to assess resources required to systematically manage OHS and to analyse relevant workplace information and data
- research and data analysis skills to evaluate interactions between employees, their activities, equipment, environment and work systems
- technology skills to access internal and external OHS data
- evaluation skills to systematically manage required OHS resources and where appropriate access these resources
- analysis skills to evaluate relevant workplace information and data and to recognise limitations of data
- numeracy skills to carry out simple arithmetical calculations and to produce graphs of workplace data to identify trends
- technical skills to use basic measuring equipment and to read scales and dials applicable to selected hazards
- analysis skills to interpret results from workplace measurements
- maintenance skills to maintain equipment used for workplace monitoring
- investigate skills to recognise that health effects could be due to microbiological hazards and the need to refer to specialist advice and support.

Required knowledge

- basic physiology relevant to understanding mode of action of physical, biological and chemical agents on the body and how they produce discomfort or harm
- characteristics, mode of action and units of measurement of major hazard types
- environmental conditions that impact on measurements
- exposure standards, their limitations and their practical use
- mathematical knowledge of units of measurement, logarithmic scales, decimals and order of magnitude relevant to making and interpreting measurements and measurement error
- nature of workplace processes (including work flow, planning and control) and hazards relevant to the particular workplace
- requirements for individual fitting, use, maintenance and storage of a range of OHS equipment
- requirements for reporting under OHS and other relevant legislation including obligations for notification and reporting of incidents
- requirements for work permits/written authorities when conducting workplace monitoring activities
- requirements under hazard specific OHS legislation and codes of practice
- sampling techniques and developing valid sampling process
- state/territory and commonwealth OHS legislation (acts, regulations, codes of practice, associated standards and guidance material) including prescriptive and

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REQUIRED SKILLS AND KNOWLEDGE
performance approaches, and links to other relevant legislation such as industrial relations, equal employment opportunity, workers compensation, rehabilitation • types of and techniques for correct use of intrinsically safe measuring and monitoring equipment including calibration, adjustment and maintenance, alarms and limitations on use and output • requirements for record keeping that addresses OHS, privacy and other relevant legislation.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • accurate use of appropriate equipment to monitor selected agents and/or conditions in the workplace • knowledge of relevant legislation, acts, regulations, codes of practice, associated standards and guidance material specific to measuring processes to identify hazards, assess risk and monitor the effectiveness of risk controls.
Context of and specific resources for assessment	Assessment must ensure: • access to a workplace or a simulated workplace with hazards requiring testing and monitoring • access to appropriate office and workplace equipment and resources • access to relevant legislation, standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques used to measure and monitor workplace hazards • direct questioning combined with review of

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EVIDENCE GUIDE	
	portfolios of evidence and third party reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of techniques for correctly using intrinsically safe measuring and monitoring equipment • review of documented results • review of reports on testing undertaken • evaluation of equipment operability.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS404B Contribute to the implementation of strategies to control OHS risk.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Agent and/or condition may include:	• real or potential hazard to be monitored and may include, but is not be limited to: • biological agents such as insects, mites and bacteria • electricity • fibres, dusts, particulates • fumes, mists, gases, vapours • heat and humidity • light • noise • radiation (ionising, non-ionising, laser) • vibration
Characteristics may include:	• dose factors relating to concentration and time • how an agent affects specific parts of the body, such as extent of damage to tissue and/or

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RANGE STATEMENT	
	effects such as additive, antagonistic, synergism and potentiation • how an agent is absorbed into the body • way an agent behaves in the environment, including over distance and time
Defining the ***area*** where measurements are to be taken may include:	• area/space available • location • movements of people and equipment • number of persons occupying area • other factors that may impact on the sampling or data collection processes • physical features of equipment, such as emitting sources • tasks/activities being undertaken
Regulatory requirements and/or standards may include:	• Australian and international standards, such as those produced by Standards Australia and the Australian Safety and Compensation Council • biological exposure indices • exposure standards for atmospheric contaminants in occupational environments • guidance material such as guidance notes, guides, fact sheets, model regulations and technical reports that provide practical guidance and directions for hazard control • material safety data sheets (MSDSs) • state/territory and commonwealth OHS legislation, regulations and codes of practice, including those relating to specific hazards
Sampling process may include:	• other practical and financial considerations • process, substance or hazard event likely to be causing the ill health or symptoms • size of the workforce (i.e. individual worker or group/s of workers) • type of exposure
Information and data collected may include:	• conditions such as activities and number of people present when measurements were made • date, time and duration of collection • locations where information and data was collected • readouts/measurements taken • sampling method (e.g. grab, longitudinal, continuous)

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RANGE STATEMENT	
	• specifications of equipment used
Operability of equipment may include:	• availability of appropriate attachments, leads, filters etc • battery serviceability checks • check and function tests • National Association of Testing Authorities (NATA) tested and certified, with certificate of currency as appropriate
Purpose of report may include:	• as a basis for design of improved and/or new control measures • hazard identification • legal compliance • risk assessment
Target audience may include:	• designers and engineers • management • OHS committee or OHS representatives • OHS or environmental regulatory bodies • OHS professionals

Required information and data may include:	• agent/condition being monitored and key issues associated with the agent/condition
	• evaluation of results with reference to appropriate standards
	• interpretation and discussion of results
	• sampling process:
	  • conditions at time of sampling, including whether the sampling period represented normal operating conditions
	  • how measurements were taken
	  • locations where samples were taken
	  • specifications of equipment used
	• table of results
	• target audience for report
	• where, when and why measurements were taken

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS407A Monitor a safe workplace

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to implement and monitor the organisation's occupational health and safety (OHS) policies, procedures and programs in the relevant work area to meet legislative requirements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to employees with supervisory responsibilities for implementing and monitoring the organisation's OHS policies, procedures and programs in a work area. This unit applies to individuals with a broad knowledge of OHS policies who contribute well developed skills in creating solutions to unpredictable problems through analysis and evaluation of information from a variety of sources. They provide supervision and guidance to others and have limited responsibility for the output of others.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Provide information to the workgroup about OHS policies and procedures	1.1. Accurately explain relevant provisions of ***OHS legislation and codes of practice*** to the workgroup 1.2. Provide information to the workgroup on the ***organisation's OHS policies***, ***procedures and programs***, ensuring it is readily accessible by the workgroup 1.3. Regularly provide and clearly explain information about ***identified hazards and the outcomes of risk assessment*** and control to the workgroup
2. Implement and monitor participative arrangements for the management of OHS	2.1. Explain the importance of effective consultative mechanisms in managing health and safety risks 2.2. Implement and monitor consultative procedures to facilitate participation of workgroup in management of work area hazards 2.3. Promptly deal with issues raised through consultation, in accordance with ***organisational consultation procedures***

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ELEMENT	PERFORMANCE CRITERIA
	2.4. Promptly record and communicate to the workgroup the outcomes of consultation over OHS issues
3. Implement and monitor the organisation's procedures for providing OHS training	3.1. Systematically identify OHS training needs in line with organisational requirements 3.2. Make arrangements to meet OHS training needs of team members in consultation with relevant individuals 3.3. Provide workplace learning opportunities, and coaching and mentoring assistance to facilitate team and individual achievement of identified training needs 3.4. Identify and report to management the costs associated with providing training for work team, for inclusion in financial plans
4. Implement and monitor procedures for identifying hazards and assessing risks	4.1. Identify and report on hazards in work area in accordance with OHS policies and procedures 4.2. Promptly action team member hazard reports in accordance with organisational procedures
5. Implement and monitor the organisation's procedures for controlling risks	5.1. Implement ***procedures to control risks*** using the hierarchy of controls and organisational requirements 5.2. Identify and report inadequacies in existing risk control measures in accordance with the hierarchy of controls 5.3. Monitor outcomes of reported inadequacies, where appropriate, to ensure a prompt organisational response
6. Implement and monitor the organisation's procedures for maintaining OHS records for the team	6.1. Accurately complete and maintain ***OHS records*** of incidents of occupational injury and disease in work area in accordance with OHS legal requirements 6.2. Use aggregate information and data from work area records to identify hazards and monitor risk control procedures in work area

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills
• analytical skills to identify hazards, to assess risks in the work area and to review data relating to monitoring and evaluating incidents (accidents), environmental issues and the effectiveness of risk control measures • literacy skills to comprehend documentation and to interpret OHS requirements • coaching and mentoring skills to provide support to colleagues.
Required knowledge

• key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • environmental issues
  • OHS
• legal responsibilities of employers, supervisors and employees in the workplace
• hazards and associated risks which exist in the workplace
• organisational policies and procedures relating to hazard management, fire, emergency, evacuation, incident (accident) investigating and reporting
• relevance of consultation as a key mechanism for improving workplace culture.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • applying organisational management systems and procedures to OHS within workgroup area • applying procedures for assessing and controlling risks to health and safety associated with those hazards, in accordance with the hierarchy of controls • providing specific, clear and accurate information

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EVIDENCE GUIDE	
	and advice on workplace hazards to workgroup • knowledge of legal responsibilities of employers, supervisors and employees in the workplace.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of documentation relating to hazards in the work lace • examples of documents relating to workplace safety, hazard identification and risk assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of records communicating the outcomes of consultation over OHS issues to the workgroup • analysis of responses to case studies and scenarios • demonstration of techniques • review of reports to management on the costs associated with providing training for the work team • oral or written questioning to assess knowledge of workplace safety and hazards • examples of risk assessments • evaluation of actioning of team member hazard reports • review of OHS records of occupational injury and disease incidents in work area.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • management units • other OHS units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
OHS legislation and codes of practice may include:	• common law duties to meet the general duty of care requirements • health and safety representatives and health and safety committees • prompt resolution of health and safety issues • provision of information, induction and training • regulations and approved codes of practice relating to hazards present in work area • relevant state/territory legislation • requirements for the maintenance and confidentiality of records of occupational injury and disease
Organisation's OHS policies, ***procedures and programs*** may include:	• consultative arrangements for employees in work area • dangerous goods transport and storage • emergency and evacuation procedures • first aid provision/medical practitioner contact and attention • hazard reporting procedures • hazardous substances use and storage • incident (accident) investigation • OHS arrangements for on site contractors, visitors and members of public • OHS audits and safety inspections • plant and equipment maintenance and use • procedures for hazard identification • procedures for risk assessment, selection and implementation of risk control measures • purchasing policy and procedures • safe operating procedures/instructions • site access • use and care of personal protective equipment

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RANGE STATEMENT	
Identified hazards and the outcomes of risk assessment may include:	• checking equipment before and during work • consulting work team members • daily informal employee consultation and regular formal employee meetings • housekeeping • OHS audits and review of audit reports • review of health and safety records including hazard reports, hazardous substances and dangerous goods registers, injury records • workplace inspections in area of responsibility
Organisational consultation procedures may include:	• attendance of health and safety representatives at management and OHS planning meetings • counselling/disciplinary processes • early response to employee suggestions, requests, reports and concerns put forward to management • election of health and safety representatives in accordance with legislative requirements • formal and informal meetings • health and safety committees • other committees, for example, planning and purchasing
Procedures to control risks may include:	• consultation with employees and their representatives • job/process/workplace re-design e.g. introduce mechanical handling equipment, re-arrange material flow/timing/scheduling, raise/lower work platforms • removing the cause of a risk at its source (eliminating the hazard) e.g. removing stored goods permanently from emergency exit passageways • selecting control measures in accordance with the hierarchy i.e. work through hierarchy from most effective to least effective control
OHS records may include:	• audit and inspection reports • consultation e.g. meetings of health & safety committees, workgroup meeting agendas including OHS items and actions • first aid/medical post records • hazardous substances registers • induction, instruction and training

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RANGE STATEMENT	
	• manufacturer's and supplier's information including dangerous goods storage lists • plant and equipment maintenance and testing reports • workers compensation and rehabilitation records • workplace environmental monitoring records

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS408A Assist with compliance with OHS and other relevant laws

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes required to apply an understanding of the legal and regulatory framework of OHS in order to provide advice regarding the OHS legislative responsibilities of an OHS practitioner, company director, manager, supervisor and employee. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit OHS applies to individuals with supervisory responsibilities for assisting with legal compliance as part of a systematic approach to managing OHS. It includes identification of common law duty of care, appropriate legislation and regulations and the necessary actions to ensure compliance in the workplace. The unit may apply both in a work unit of a large organisation or in a small to medium enterprise.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Determine the legal framework of OHS in the workplace	1.1. Seek ***current legislation and related documentation relevant to OHS*** and the organisation's operations 1.2. Use knowledge of the relationship between OHS Acts, OHS regulations, codes of practice, associated standards and guidance material to determine legal requirements in the workplace 1.3. Identify and confirm ***responsibilities and requirements*** as specified in legislation 1.4. Clarify responsibilities and requirements and seek advice from ***legal advisors*** where necessary
2. Provide advice on OHS compliance	2.1. Provide advice to ***appropriate personnel*** about the specific legal responsibilities of employers including duty of care and how it is codified in relevant OHS legislation 2.2. Provide advice to appropriate personnel about

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ELEMENT	PERFORMANCE CRITERIA
	administration of ***enforcement processes and instruments*** including penalties that apply to organisations prosecuted under relevant OHS legislation 2.3. Provide advice to appropriate personnel on how negligence is determined at statutory and common law
3. Comply with legal requirements	3.1. Take action is to ensure that the workplace, including systems of work and work organisation, is appraised against and complies with relevant legislation 3.2. Identify training needs of ***those with OHS responsibilities*** and provide training as required according to legal requirements 3.3. Identify requirements for other training under OHS legislation and arrange training as required 3.4. Recognise limits of own professional expertise and consult legal advisors as required
4. Report incidents of non compliance	4.1. Raise promptly with ***responsible persons*** possible breaches as required 4.2. Provide advice on arrangements for incident reporting to government authorities in accordance with relevant OHS legislation and organisational procedures 4.3. Raise in accordance with OHS procedures inadequacies which may contribute to non compliance in systematic approaches to managing OHS procedures and/or practices
5. Contribute to ongoing monitoring of compliance with OHS legislation	5.1. Monitor compliance with OHS legislative requirements 5.2. Resolve or refer compliance issues in accordance with OHS policies and procedures, and relevant OHS legislation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities at all levels of the organisation • literacy skills to prepare reports for a range of target groups including OHS committee, OHS representatives, managers, supervisors • interpersonal skills to communicate effectively with personnel at all levels of organisation, and legal and OHS specialists • facilitation skills to conduct effective formal and informal meetings • research and data analysis skills to analyse relevant OHS information and data, and make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems in order to meet requirements of OHS legislation
Required knowledge
• relevant state/territory and commonwealth OHS legislation, codes of practice and standards • roles and responsibilities of personnel as specified in relevant OHS legislation • structure and forms of legislation including regulations, codes of practice, associated standards and guidance material • requirements for reporting under OHS and other relevant legislation including obligations for notification and reporting of incidents • concept of common law duty of care • systematic approaches to managing and complying with OHS legislation • professional liability in relation to giving advice

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • evidence of the application of advice regarding the legal and regulatory framework of OHS and other relevant legislation, either in an actual workplace, simulation exercise or scenario

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EVIDENCE GUIDE	
	• products developed for provision of advice on OHS legal compliance issues • evidence of how these products were developed and used either in an actual workplace, simulation exercise or scenario.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant legislation, codes of practice, standards and guidance material • access to other appropriate workplace documentation • reports from other parties consulted in ensuring OHS compliance
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • demonstration of techniques used to assist with compliance of OHS in the workplace • oral or written questioning to assess knowledge of: how advice was provided in the workplace, interpreting and applying legislation, reporting requirements required by legislation, systematic approaches to OHS • review of OHS action plans, documented OHS training needs and documents recording processes undertaken to ensure OHS compliance • simulated project based activity, scenarios, case studies, role plays or actual activities associated with a systems approach to managing OHS
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS401B Contribute to implementation of a systematic approach to managing OHS

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Current Legislation and related documentation relevant to OHS will include:	• current Commonwealth and relevant state/territory OHS legislation, regulations, codes of practice, associated standards and guidance material • workers compensation • privacy legislation • contract law • trade practices • criminal law • common law • industrial relations law • equal employment opportunity and anti-discrimination law • Australian and international standards
Responsibilities and requirements may include legal obligations under relevant OHS legislation for the following persons:	• employers • self-employed persons • persons in control of workplaces • contractors • designers, manufacturers, importers, suppliers of plant • erectors and installers of certain plant • manufacturers, importers and suppliers of substances • employees • OHS committees • OHS representatives
Legal advisors may include:	• legal practitioners, either internal or external • government OHS inspectors
Appropriate personnel may include:	• employers • company directors • managers • supervisors • employees • OHS representatives and committees

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RANGE STATEMENT	
	• contractors
Enforcement processes and instruments may include:	• prohibition notices • improvement notices • on-the-spot fines • provisional improvement notices
Those with OHS responsibilities may include:	• company director • manager • supervisors • OHS representatives
Responsible persons may include:	• OHS advisor • manager • supervisor • other appropriate person(s) delegated authority to act or apply rectification controls within the organisation

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS501B Participate in the coordination and maintenance of a systematic approach to managing OHS

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively participate in the coordination and maintenance of a systematic approach to managing occupational health and safety (OHS) in the workplace. It includes strategies, policies and procedures necessary to systematically manage OHS and its evaluation to ensure that the workplace is, as far as is practicable, safe and without risks to the health of employees and others. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for coordinating and maintaining an OHS program. It involves identifying the need for change, planning and implementing strategies, integrating OHS within other functional areas, and some evaluation of the OHS management function. The unit may be undertaken in the context of an OHS management system (OHSMS) or other systematic approaches to managing OHS.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Contribute to the strategic planning process	1.1. Take steps to ensure that managers at all levels are aware of their OHS responsibilities and the role of OHS in the overall management approach 1.2. Determine OHS needs and priorities in consultation with relevant managers and other workplace ***stakeholders*** and ***key personnel*** 1.3. Make recommendations for inclusion of OHS performance (including ***positive performance indicators*** [PPIs]) in the organisation's business plan
2. Participate in the development of an OHS plan	2.1. Identify potential ***motivators*** among stakeholders together with potential ***barriers to the implementation of a systematic approach to managing OHS*** 2.2. Develop an ***OHS plan*** in consultation with

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ELEMENT	PERFORMANCE CRITERIA
	workplace stakeholders, based on agreed priorities and with measurable outcomes 2.3. Identify ***resources*** required for implementation of the OHS plan 2.4. Develop action plans with relevant responsibilities and time lines 2.5. Communicate action plans to key personnel
3. Support the implementation of the systematic approach to managing OHS	3.1. Apply knowledge of OHS management and OHS disciplines in consultation with stakeholders, ***OHS specialists*** and ***technical advisors***, to the development of ***policies and procedures*** 3.2. Provide support to managers to meet OHS responsibilities and to implement action plans 3.3. Develop strategies to effectively integrate OHS within ***other functional areas and management systems*** that impact on the management of OHS 3.4. Identify OHS training needs and formulate recommendations for delivery
4. Provide advice to key personnel and stakeholders	4.1. Provide objective advice in an ***ethical*** and non-discriminating manner 4.2. Identify situations where OHS specialists may be required
5. Participate in monitoring OHS	5.1. Identify implications for the management of OHS and ***proposed changes to the workplace*** in consultation with stakeholders 5.2. Identify implications for the management of OHS, ***external changes*** and changes to available information and data in consultation with stakeholders 5.3. Access ***sources of workplace information and data*** as part of regular monitoring of OHS 5.4. Monitor achievement against action plans and update plans as appropriate 5.5. Take action to update systematic approaches to manage OHS, taking into account proposed changes
6. Participate in reviewing the management of OHS	6.1. Regularly review the effectiveness of systematic approaches to managing OHS 6.2. Determine frequency, method and scope of review in consultation with stakeholders 6.3. Provide stakeholders with input to the review 6.4. Identify targets for improvement in the management

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ELEMENT	PERFORMANCE CRITERIA
	of OHS and make recommendations for improvement 6.5. Communicate to appropriate levels of authority through planning, documentation and implementation, improvement strategies arising from the review

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• analytical skills to:
  • identify areas for OHS improvement
  • analyse relevant workplace information and data, and make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
  • contribute to the assessment of the resources needed to systematically manage OHS and, where appropriate, access resources
• numeracy skills to carry out simple arithmetical calculations (e.g. % change), and to produce graphs of workplace information and data to identify trends and recognise limitations
• communication skills to:
  • conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  • prepare reports for a range of target groups including OHS committee, OHS representatives, managers and supervisors
• consultation and negotiation skills to develop plans, and to implement and monitor designated actions
• project management skills to achieve change in OHS matters
• organisational skills to manage own tasks within a timeframe
• information technology skills to access internal and external information and data on OHS.

Required knowledge
• legislative requirements for OHS information and data, and consultation • roles and responsibilities in relation to communication and consultation for OHS

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REQUIRED SKILLS AND KNOWLEDGE

committees, OHS representatives, line management, employees and inspectors
• requirements for record keeping that addresses OHS, privacy and other legislation
• state/territory and commonwealth OHS legislation (acts, regulations, codes of practice, associated standards and guidance material) including prescriptive and performance approaches and links to other relevant legislation such as industrial relations, equal employment opportunity, workers compensation, rehabilitation
• roles and responsibilities under OHS legislation of employees, including supervisors and contractors
• structure and forms of legislation including regulations, codes of practice, associated standards and guidance material
• difference between common law and statutory law
• concept of common law duty of care
• facilitation of the use of tools such as PPIs in assessment of OHS performance
• nature of information and data that provides valid and reliable results on performance of OHS management processes (including positive indicators, such as number of safety audits conducted)
• requirements for reporting under OHS and other relevant legislation including notification and reporting of incidents
• hierarchy of control and considerations for choosing between different control measures, such as possible inadequacies of particular control measures
• other functional areas that impact on the management of OHS
• auditing methods and techniques
• how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:
  • labour market changes
  • structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location
  • language, literacy and numeracy
  • communication skills
  • cultural background/workplace diversity
  • gender
  • workers with specific needs.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • participation in organisational coordination and maintenance of OHS and associated systematic approaches • knowledge of relevant OHS legislation (acts, regulations, codes of practice, associated standards and guidance material).
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment, resources and workplace documentation • access to relevant legislation, standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on the effectiveness of the OHS management system • demonstration of techniques used to implement and maintain systematic OHS approaches • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of the requirements for record keeping that addresses OHS, privacy and other legislation • evaluation of OHS needs and priorities • review of OHS plan and actions plans • review of OHS training needs and recommendations for delivery • monitoring of achievement against action plans and updating of plans.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS601B Develop a systematic approach to

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EVIDENCE GUIDE	
	managing OHS.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Stakeholders may include:	• employees • health and safety, and other employee representatives • managers • OHS committees • supervisors
Key personnel may include:	• managers from other areas • people involved in OHS decision making or who are likely to be impacted by decisions relating to OHS
Positive performance indicators may include:	• data, facts or statistics which demonstrate how successfully a workplace is performing through measuring OHS processes
Motivators may include:	• factors that make stakeholders likely to adopt OHS processes
Barriers to the implementation of a systematic approach to managing OHS may include:	• barriers to communication, such as language/literacy • diversity of workers • structural factors, such as multiple locations, shift work and supervisory arrangements • workplace culture issues, such as management commitment, supervisors' approach to compliance and acceptance of the priority of safety
A systemic approach to managing OHS may include:	• comprehensive processes that are combined in a methodical and ordered manner to minimise the risk of injury or ill health in the workplace • processes of:

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RANGE STATEMENT	
	• allocation of resources • communication and consultation • hazard management • planning • record keeping and reporting • review and evaluation for ongoing improvement • training and competency
OHS plan may include:	• a document that is usually developed annually but may be developed for a shorter or longer period and reviewed regularly • OHS performance indicators (i.e. objectives and targets that are achievable and practical) reflecting systematic approaches to managing OHS

Resources may include:	• financial requirement for implementation
	• personnel, including time allocation
	• equipment
	• specialised resources
	• access to other resources such as:
	  • OHS publications
	  • OHS internal sites
	  • industry-specific information

OHS specialists may include:	• ergonomists • injury management advisors • occupational health professionals • occupational hygienists
Technical advisors may include:	• engineers (such as design, acoustic, safety, mechanical and civil) • legal practitioners • maintenance and trades persons • workplace assessors and trainers
Policies and procedures may include:	• documents describing how tasks, projects, inspections, jobs and processes are to be undertaken • job/task statements • policies and procedures underpinning the management of OHS • purchasing and contracting procedures • quality system documentation

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RANGE STATEMENT	
	• standard operating procedures
Other functional areas and management systems may include:	• engineering and maintenance • environmental management • finance and auditing • human resources, industrial relations and personnel management including payroll • information, data and records management • logistics • purchasing, procurement and contracting • quality management • strategic planning
Ethical advice may include:	• advice provided with the prime aim of reduction of workplace injury and ill health
Proposed changes to the workplace may include:	• changes to management practices • changes to work processes, work systems, work organisation, work practices and conditions • design of workplace • design or purchase of new plant or equipment • materials purchases
External changes may include:	• changes to legislation • new information and data available on OHS
Sources of workplace information and data may include:	• audits • hazard, incident and investigation reports • material safety data sheets (MSDSs) and registers • minutes of meetings • questionnaire information and data • reports - including those from external consultants • workplace inspections

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS502B Participate in the management of the OHS information and data systems

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to participate in the provision of information and performance data necessary to inform management and other stakeholders of occupational health and safety (OHS) issues and to measure and evaluate the management of OHS. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for providing technical and legal information and data necessary to ensure that management and other stakeholders are informed about OHS and the effectiveness of the management of OHS. The unit involves accessing and providing OHS information; collecting, collating and analysing data; and ensuring that this information and data is distributed throughout the workplace. It also addresses the legislative requirements for reporting and notifying on OHS matters.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Access sources of OHS information and data	1.1. Identify, access and regularly review relevant ***sources of OHS information and data*** 1.2. Critically evaluate information and data to ensure its accuracy, currency and relevance 1.3. Determine ***appropriate formats*** for information, and data storage and retrieval
2. Assist in the application of policies and procedures for collection of workplace information, data and records	2.1. Inform managers and ***key personnel*** of ***legal requirements*** for information and data collection, and record keeping 2.2. Keep OHS records using ***appropriate tools*** 2.3. Collect workplace information and data according to ***established procedures*** 2.4. Regularly review procedures for information and data collection, record keeping, amendments to

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ELEMENT	PERFORMANCE CRITERIA
	legislation, and distribution of records to ensure their usability and relevance
3. Assist in maintaining information and data management systems that enable retrieval and distribution of OHS information and data	3.1. Make recommendations for storage of OHS information and data in a manner that makes it accessible to ***stakeholders*** and key personnel 3.2. Accurately enter and ***ethically store OHS information and data records*** 3.3. Identify purposes and appropriate uses of OHS information and data for meaningful outcomes 3.4. Accurately meet ***legislated reporting requirements*** to external bodies within time limits 3.5. Regularly assess training needs relevant to the management of the information and data system for appropriate personnel and action as appropriate 3.6. Regularly evaluate information and data management systems to ensure ease of use and relevance to the OHS needs of the organisation
4. Participate in the analysis of information and data to identify trends and actions for prevention	4.1. Evaluate ***information and data collected*** for validity and reliability 4.2. Identify ***analytical techniques*** appropriate for evaluation of OHS performance (including positive performance indicators [PPIs]) and identification of areas for improvement 4.3. Apply analytical techniques appropriately and accurately 4.4. Regularly review OHS information and data analysis processes in consultation with stakeholders, to ensure organisational and legislative requirements
5. Communicate OHS information and results of data analysis to stakeholders and external bodies	5.1. Appropriately format outcomes of information and data analysis taking account of the ***target audience*** 5.2. Disseminate OHS information and data to managers, key personnel and stakeholders taking account of legal and ethical requirements 5.3. Communicate OHS information and data objectively and seek feedback 5.4. Make recommendations for improvement in prevention strategies based upon information access and data analysis
6. Communicate the effectiveness of OHS information and data systems through	6.1. Regularly review the effectiveness of the OHS information and data systems 6.2. Determine frequency, method and scope of review

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ELEMENT	PERFORMANCE CRITERIA
monitoring and evaluation	in consultation with stakeholders 6.3. Ensure stakeholders have input to review 6.4. Identify areas for improvement in the OHS information and data systems and make recommendations for improvement 6.5. Communicate improvement strategies arising from the review to appropriate levels of authority through planning, documentation and implementation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - identify areas for OHS information management improvement
  - analyse relevant workplace information and data, and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
  - contribute to the assessment of the resources needed to systematically manage OHS and, where appropriate, access resources
- numeracy skills to carry out simple arithmetical calculations (e.g. % change), and to produce graphs of workplace information and data to identify trends and recognise limitations
- communication skills to:
  - conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  - prepare reports for a range of target groups including OHS committee, OHS representatives, managers and supervisors
  - use language and literacy skills appropriate to the workgroup and the task
- consultation and negotiation skills to develop plans, and to implement and monitor designated actions
- project management skills to achieve change in OHS matters
- organisational skills to manage own tasks within a timeframe
- information technology skills to access and enter internal and external information and data on OHS and to use a range of communication media.

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REQUIRED SKILLS AND KNOWLEDGE

Required knowledge

- auditing methods and techniques
- concept of common law duty of care
- difference between common law and statutory law
- ethics related to professional practice
- facilitation of the use of tools such as PPIs in assessment of OHS performance
- how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:
  - communication skills
  - cultural background/workplace diversity
  - gender
  - labour market changes
  - language, literacy and numeracy
  - structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location
  - workers with specific needs
- internal and external sources of OHS information and data
- key personnel, including identifying 'change agents', within workplace management structure
- language, literacy and cultural profile of the workgroup
- legislative requirements for OHS information and data, and consultation
- methods of collecting reliable information and data, commonly encountered problems in collection and strategies for overcoming such problems
- methods of providing evidence of compliance with OHS legislation
- nature of information and data that provides valid and reliable results on performance of OHS management processes (including positive indicators, such as number of safety audits conducted)
- organisational culture as it impacts on the workgroup
- organisational OHS policies and procedures
- professional liability in relation to providing advice
- requirements for record keeping that addresses OHS, privacy and other legislation
- requirements for reporting under OHS and other relevant legislation including notification and reporting of incidents
- roles and responsibilities in relation to communication and consultation for OHS committees, OHS representatives, line management, employees and inspectors
- state/territory and commonwealth OHS legislation (acts, regulations, codes of practice, associated standards and guidance material) including prescriptive and performance approaches and links to other relevant legislation such as industrial relations, equal employment opportunity, workers compensation, rehabilitation
- structure and forms of legislation including regulations, codes of practice,

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REQUIRED SKILLS AND KNOWLEDGE
associated standards and guidance material.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • participation in the implementation of OHS information and data systems within an organisation or business unit • knowledge of relevant legislation (acts, regulations, codes of practice, associated standards and guidance material).
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation, reports and sample software for OHS information and data collation and analysis • access to relevant legislation, standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on the effectiveness of OHS information and data systems • demonstration of techniques used to manage OHS information and data systems • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of methods of collecting reliable information and data,

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EVIDENCE GUIDE	
	commonly encountered problems in collection and strategies for overcoming such problems • review of OHS records • evaluation of information and data collected • review of communication of OHS information and data • evaluation of recommendations for improvement in prevention strategies.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Sources of OHS information and data may include:	• external sources such as: • Australian and industry standards • Australian Bureau of Statistics (ABS) • Australian Safety and Compensation Council • internet, journals, magazines • manufacturers' manuals and specifications • OHS authorities • OHS legislation and codes of practice • OHS professional bodies • research literature • technical information and data • unions and industry bodies • internal sources such as: • employee information papers, brochures,

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RANGE STATEMENT	
	notes, newsletters • job and work system analysis (JSAs) • manufacturers' manuals • material safety data sheets MSDSs and registers • OHS policies and procedures • OHS reports including, workplace inspections, hazard and incident reports, technical reports, consultations and observations • organisational data such as insurance records, incident investigation, enforcement notices and actions, workers compensation data, OHS performance indicators, audits • risk assessments (past and present) • safety handbooks • work instructions
Appropriate formats may include:	• electronic or paper-based • intranet or CD-ROM • recognised records and data management systems
Key personnel may include:	• managers from other areas • people involved in OHS decision making or who are affected by OHS decisions
Legal requirements may include:	• legislation, regulations and standards governing: • privacy and confidentiality of personal records • records for monitoring and exposure to specific hazards • reporting of incidents • workers compensation • workplace equity
Appropriate tools may include:	• electronic systems • graphical representations • handbooks • paper-based systems • performance monitoring charts and checklists • registers
Established procedures may	• contract and tender documentation

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RANGE STATEMENT	
include:	• formal and/or informal procedures • legislation and codes of practice • manufacturers' recommendations, and maintenance and servicing schedules • OHS management systems • organisational policies and procedures including accident and incident recording system • recognised industry standards • relevant workers compensation processes
Stakeholders may include:	• employees • health and safety, and other employee representatives • management • OHS committees • supervisors
Ethically store OHS information and data records may include:	• commercial in confidence information as appropriate • confidentiality • ensuring access to personal records, within legislative requirements • privacy, as appropriate
Legislated reporting requirements may include:	• serious injury and serious incident reporting to OHS authorities
Information and data collected may include:	• data relating to implementation of OHS plans and processes • hazard registers • incident data including injury and disease • job safety analyses • MSDSs and registers • OHS performance indicators • OHS policies and procedures • risk assessments
Analytical techniques may include:	• basic statistical tests such as means, standard deviation and percentage change

Target audience may include:	• internal stakeholders, including:
	  • board/committee of management
	  • contractors
	  • employees and their families

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RANGE STATEMENT	

	• managers
	• OHS committees
	• supervisors
	• visitors and others on site
	• external stakeholders, including:
	  • customers, shareholders, local community (directly or via the media)
	  • insurance agencies
	  • OHS regulators
	  • other relevant statutory bodies
	  • representatives of special interest groups and agencies

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS503B Assist in the design and development of OHS participative arrangements

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assist in designing and developing effective participative arrangements as an integral part of systematic approaches to managing occupational health and safety (OHS). This process will result in stakeholders having real opportunities to participate in OHS processes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for identifying, designing, developing and reviewing formal and informal processes to enable people to participate in OHS decision making. The unit also addresses influencing others from an OHS perspective and takes account of the responsibilities for managing OHS. This unit is underpinned by BSBOHS402B Contribute to the implementation of the OHS consultation process.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify the need for OHS participative arrangements	1.1. Review OHS legislation to identify legal requirements for ***participative arrangements*** 1.2. Identify ***factors that may impact on the design of participative arrangements*** 1.3. Review organisational policies and procedures to identify requirements and opportunities for OHS consultation and communication 1.4. Review effectiveness of existing workplace arrangements, in consultation with ***stakeholders***, for OHS consultation and communication 1.5. Define information and consultation requirements, in consultation with stakeholders and ***key personnel***, for specific roles and groups
2. Assist in the design of participative arrangements	2.1. Design processes, in consultation with stakeholders, for providing required OHS information and data 2.2. Design processes, in consultation with stakeholders, to enable individuals and groups to be consulted

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ELEMENT	PERFORMANCE CRITERIA
	regarding workplace OHS issues and to have input into OHS decision making 2.3. Identify and document ***training needs*** to enable effective participation 2.4. Review recommendations for participative arrangements, in consultation with stakeholders, to ensure they meet legislative requirements and are realistic, practical and acceptable in the workplace
3. Assist in developing participative arrangements	3.1. Develop policies and procedures for participative arrangements 3.2. Identify key personnel in the introduction and maintenance of participative arrangements 3.3. Develop strategies for the delivery of training 3.4. Identify and document ***resources*** necessary to introduce and maintain participative arrangements
4. Support the implementation of participative arrangements	4.1. Determine priorities for action in consultation with stakeholders 4.2. Develop action plans with allocated responsibilities and time lines 4.3. Provide advice and support to key personnel 4.4. Monitor implementation, in consultation with stakeholders, to ensure that participatory arrangements are effective in providing information and data to all groups and that they provide opportunity for participation in OHS decision making 4.5. Make recommendations for adjustments to the implementation as required
5. Evaluate the design and development of participative arrangements	5.1. Design the ***evaluation protocol*** in consultation with stakeholders 5.2. Develop a plan for collecting ***information and data*** 5.3. Analyse and evaluate information and data 5.4. Make recommendations for improvement in the participatory arrangements as a result of the evaluation findings 5.5. Provide a report to stakeholders and key personnel on the outcomes of the evaluation, and recommendations for further development and improvement 5.6. Seek feedback from stakeholders and develop an action plan for ongoing improvements

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - identify areas for improvement
  - analyse relevant workplace information and data, and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
  - contribute to the assessment of resources needed to systematically manage OHS and, where appropriate, access resources
- planning skills to apply continuous improvement and action planning processes
- research skills to access relevant OHS information and data
- numeracy skills to carry out simple arithmetical calculations (e.g. % change), and to produce graphs of workplace information and data to identify trends and recognise limitations
- communication skills to:
  - conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  - prepare reports for a range of target groups including OHS committee, OHS representatives, managers and supervisors
  - use language and literacy skills appropriate to the workgroup and the task
- consultation and negotiation skills to develop plans, and to implement and monitor designated actions
- project management skills to achieve change in OHS matters
- organisational skills to manage own tasks within a timeframe
- information technology skills to access and enter internal and external information and data on OHS, and to use a range of communication media.

Required knowledge

- concept of common law duty of care
- difference between common law and statutory law
- ethics related to professional practice
- formal and informal communication and consultation processes and key personnel related to communication
- how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:

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REQUIRED SKILLS AND KNOWLEDGE
• communication skills • cultural background/workplace diversity • gender • labour market changes • language, literacy and numeracy • structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location • workers with specific needs and limitations • internal and external sources of OHS information and data • key personnel, including identifying 'change agents', within workplace management structure • organisational OHS policies and procedures • language, literacy and cultural profile of the workgroup • legislative requirements for OHS information and data, and consultation • methods of providing evidence of compliance with OHS legislation • organisational culture as it impacts on the workgroup • principles of effective meetings including agendas, action planning, chair and secretarial duties, minutes and action items • professional liability in relation to providing advice • rights of OHS inspectors • roles and responsibilities in relation to communication and consultation for OHS committees, OHS representatives, line management, employees and inspectors • state/territory and commonwealth OHS legislation (acts, regulations, codes of practice, associated standards and guidance material) including prescriptive and performance approaches and links to other relevant legislation such as industrial relations, equal employment opportunity, workers compensation, rehabilitation • structure and forms of legislation including regulations, codes of practice, associated standards and guidance material.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential:

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EVIDENCE GUIDE	
competency in this unit	• design and development of a participative approach to the management of workplace OHS • knowledge of relevant OHS legislation (acts, regulations, codes of practice, associated standards and guidance material).
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation and personnel • reports from other parties consulted in designing, implementing, managing and reviewing processes • access to relevant legislation, standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on the effectiveness of OHS participative arrangements • demonstration of techniques used to encourage participation in OHS in the workplace • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS • review of policies and procedures developed for participative arrangements • evaluation of action plans • written examples of reports on participative arrangements implemented in the workplace.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS402B Contribute to the implementation of the OHS consultation process • other OHS units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Participative arrangements are designed so that stakeholders are able to be involved in decision making that affects their health and safety. Participatory processes may include:	• employee and supervisor involvement in OHS activities, such as inspections and audits • health and safety, and other representatives • OHS and other consultative/planning committees • OHS included in management, staff and employee meetings • procedures for reporting hazards, and raising and addressing OHS issues
Factors that may impact on the design of participative arrangements include:	• language • shift work and rostering arrangements • timing of information and data provision • literacy and numeracy levels • workers with specific needs • workplace organisational structures (for example, size of organisation, geographic, hierarchical) • cultural diversity • management approach • workplace culture and approach to OHS by managers, supervisors and employees
Stakeholders include:	• managers • supervisors • employees • health and safety, and other employee representatives • OHS committees
Key personnel include:	• managers from other areas • people involved in OHS decision making or who are affected by OHS decisions
Training needs should be defined for:	• managers • supervisors • health and safety representatives

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RANGE STATEMENT	
	• OHS committees • other key personnel • employees generally

Resources include:	• financial requirements for implementation
	• personnel including time allocation
	• equipment
	• access to sources of information and data, such as:
	  • guidance material to circulate to stakeholders and key personnel
	  • OHS journals
	  • websites

Evaluation protocol includes:	• criteria for evaluation • how the criteria will be measured • how the information and data will be collected • time period for collection of information and data
Information and data for evaluating participative arrangements may include:	• feedback from individuals and representatives • minutes of meetings • OHS management audits • questionnaires • workshops

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

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Co-requisite units

Co-requisite units		

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BSBOHS504B Apply principles of OHS risk management

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to use a generic approach to identify hazards, and to assess and control occupational health and safety (OHS) risks. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for providing a systematic approach to hazard identification, risk assessment and risk control, with the emphasis on elimination or, where this is not possible, minimisation of risk. It also includes conceptual models for understanding the nature of hazards. The unit provides a basis for the hazard specific competencies in BSBOHS505C Manage hazards in the work environment, and BSBOHS506B Monitor and facilitate the management of hazards associated with plant. This unit is underpinned by BSBOHS403B Identify hazards and assess OHS risks, and BSBOHS404B Contribute to the implementation of strategies to control OHS risk. A more advanced approach to risk assessment, which identifies the separate elements of risk analysis and risk evaluation, is provided in BSBOHS603B Analyse and evaluate OHS risk.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Access sources of information and data to identify hazards	1.1. Access ***external sources of information and data*** to assist in identifying ***hazards*** 1.2. Review ***workplace sources of information and data*** to access and assist in identification of hazards 1.3. Seek input from ***stakeholders***, ***key personnel*** and ***OHS specialists*** 1.4. Conduct formal and informal research to ensure currency of information with ***workplace issues***
2. Analyse the work	2.1. Define, document and communicate ***occasions***

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ELEMENT	PERFORMANCE CRITERIA
environment to identify hazards	***when action for hazard identification is required*** 2.2. Source ***tools*** to assist in analysing potential hazards 2.3. Examine ***task demands*** and ***task environment*** for impact on the person to identify situations with a potential for injury or ill health 2.4. Examine workforce structure, organisation of work and work relationships to identify situations with a potential for injury or ill health 2.5. Examine work environment for ***agents*** with a potential for injury or ill health 2.6. Seek input from stakeholders to clarify and confirm issues
3. Assess risk associated with hazards	3.1. Identify ***factors contributing to risk*** 3.2. Identify current risk controls for each hazard 3.3. Evaluate adequacy of current controls (if any), taking account of ***relevant standards*** and knowledge 3.4. Identify discrepancies between current controls and required quality of control 3.5. ***Prioritise*** hazards requiring further control action 3.6. Document method and outcomes of ***risk assessment***
4. Control risk associated with hazards	4.1. Develop a range of control options in consultation with stakeholders, taking account of the outcomes of the risk assessment and the ***hierarchy of control*** 4.2. Identify potential ***factors impacting on the effectiveness of controls*** 4.3. Seek advice from OHS specialists and key personnel if required 4.4. Identify and seek appropriate authority and relevant resources to initiate and maintain controls 4.5. Identify and document actions required to achieve change 4.6. Analyse extent of change and reduction in risk, as a result of controls
5. Maintain hazard identification and risk control processes	5.1. Establish and maintain a ***risk register*** relevant to the workplace 5.2. Document and communicate risk management procedures to stakeholders and key personnel, as appropriate 5.3. Document and communicate outcomes of risk management processes to stakeholders and key personnel, as appropriate

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ELEMENT	PERFORMANCE CRITERIA
	5.4. Involve stakeholders and operational staff in risk management processes 5.5. Identify situations where OHS specialists may be required
6. Monitor and review risk management processes	6.1. Determine frequency, method and scope of review in consultation with workplace stakeholders and key personnel 6.2. Ensure stakeholders and key personnel have input to the review 6.3. Identify areas for improvement in the risk management processes and make recommendations 6.4. Prepare action plans, including allocated responsibilities and timeframes for implementation 6.5. Regularly review effectiveness of risk management processes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - identify areas for OHS risk improvement
  - analyse relevant workplace information and data
  - contribute to the assessment of the resources needed to systematically manage OHS and, where appropriate, access resources
- attention to detail when making observations and recording outcomes
- research skills to access relevant OHS information and data
- numeracy skills to carry out simple arithmetical calculations (e.g. % change), and to produce graphs of workplace information and data to identify trends and recognise limitations
- communication skills to:
  - conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  - prepare reports for a range of target groups including OHS committee, OHS representatives, managers and supervisors

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REQUIRED SKILLS AND KNOWLEDGE

- use language and literacy skills appropriate to the workgroup and the task
- consultation and negotiation skills to develop plans and to implement and monitor designated actions
- project management skills to achieve change in OHS matters
- organisational skills to manage own tasks within a timeframe
- information technology skills to access and enter internal and external information and data on OHS and to use a range of communication media

Required knowledge

- organisational behaviour and culture as it impacts on OHS and on change
- basic physiology relevant to understanding mode of action of physical, biological and chemical agents on the body and how they produce harm
- basic principles of incident causation and injury processes
- characteristics, mode of action and units of measurement of major hazard types
- concept of common law duty of care
- difference between hazard and risk
- ethics related to professional practice
- how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:
  - communication skills
  - cultural background/workplace diversity
  - gender
  - labour market changes
  - language, literacy and numeracy
  - structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location
  - workers with specific needs
- internal and external sources of OHS information and data
- language, literacy and cultural profile of the workgroup
- legislative requirements for OHS information and data, and consultation
- limitations of generic hazard and risk checklists, and risk ranking processes
- methods of providing evidence of compliance with OHS legislation
- nature of workplace processes (including work flow, planning and control) and hazards relevant to the particular workplace
- organisational culture as it impacts on the workgroup
- organisational OHS policies and procedures
- other function areas that impact on the management of OHS
- principles and practices of systematic approaches to managing OHS
- professional liability in relation to providing advice
- requirements under hazard specific OHS legislation and codes of practice
- risk as a measure of uncertainty and the factors that affect risk

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REQUIRED SKILLS AND KNOWLEDGE
• roles and responsibilities under OHS legislation of employees, including supervisors and contractors • standard industry controls for a range of hazards • state/territory and commonwealth OHS legislation (acts, regulations, codes of practice, associated standards and guidance material) including prescriptive and performance approaches and links to other relevant legislation such as industrial relations, equal employment opportunity, workers compensation, rehabilitation • structure and forms of legislation including regulations, codes of practice, associated standards and guidance material • types of hazard identification tools, including job safety analysis (JSA)

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• products used in:
	  • the application of a risk management approach to identifying hazards
	  • assessing OHS risk
	  • controlling OHS risk
	• how these products were developed and implemented
	• knowledge of relevant OHS legislation (acts, regulations, codes of practice, associated standards and guidance material.

Context of and specific resources for assessment	Assessment must ensure: • access to workplace or simulated workplace • access to workplace documentation • access to office equipment and resources • access to relevant legislation, standards and guidelines relating to risks found in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples

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EVIDENCE GUIDE	
	are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on the effectiveness of the hazard identification, risk assessment, control and management actions taken • demonstration of techniques used to identify hazards, assess associated risks, control monitor and evaluate risks • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of the OHS information system • review of action plans • written reports on hazard identification and risk management activities, matrices and measurements undertaken.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS403B Identify hazards and assess OHS risks • BSBOHS404B Contribute to the implementation of strategies to control OHS risk • BSBOHS603B Analyse and evaluate OHS risk.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
External sources of information	• databases with national and state injury data such as National Industrial Chemicals

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RANGE STATEMENT	
and data may include:	Notification and Assessment Scheme (NICNAS) • employer groups • industry bodies • journals and websites • legislation, codes of practice and standards • manufacturers' manual and specifications • OHS regulatory authorities • OHS specialists • unions.
Hazards may include:	• source or a situation with a potential for harm in terms of human injury or ill health • damage to property • damage to the environment • or a combination of these.
Workplace sources of information and data may include:	• audits • employees • hazard, incident and investigation reports • manufacturers' manuals and specifications • material safety data sheets (MSDSs) • minutes of meetings • OHS representatives • reports • workplace inspections.
Stakeholders include:	• employees • health and safety, and other employee representatives • managers • OHS committees • supervisors.
Key personnel may include:	• managers from other areas • people involved in OHS decision making or who are affected by OHS decisions
OHS specialists may include:	• engineers • ergonomists • occupational hygienists • organisational psychologists • toxicologists • workplace injury and return to work advisors.

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RANGE STATEMENT	

Workplace issues may include:	• changes in equipment, including technology
	• changes in social, political or community environment
	• changes in work organisation, including:
	  • contracting
	  • hire arrangements
	  • casualisation
	  • supervisory arrangements
	  • outworkers
	  • rosters
	  • shift work
	  • work hours
	  • work relations
	• changes in work practice
	• changes to legislation and standards
	• new knowledge on hazards
	• outcomes of court rulings.

Occasions when action for hazard identification is required may include:	• at design or pre-purchase of buildings, equipment and materials • at regular intervals during normal operations • before changes are made to workplace, equipment, work processes or work arrangements • commissioning or pre-implementation of new processes or practices • following an incident report • new forms of work and organisation of work • planning major tasks or activities, such as equipment shut-downs • prior to disposal of equipment, buildings or materials • when new knowledge becomes available.
Tools may include:	• audits • cause and effect diagrams • JSA • surveys.
Task demands may include:	• arousal and alertness • machine pacing or time pressure to complete a task • physical or physiological demands

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RANGE STATEMENT	
	• repetitive nature of task • required precision or accuracy.
Task environment may include:	• air quality • lighting • noise • thermal
Agents may be:	• biological • chemical • ergonomic • nuclear • physical • psychosocial • radiological.
Factors contributing to risk may include those associated with:	• equipment • frequency and duration of exposure • individual/operator • number of people exposed/involved • task • work environment • work organisation.
Relevant standards may include:	• Australian and industry standards • codes of practice • current knowledge related to the specific hazard and controls • current practice in the industry • legislation.
Prioritising hazards requiring further control action may include:	• other recognised processes • specially designed tools • standard ranking tools.
Risk assessment includes identification of:	• factors contributing to risk • current controls and their adequacy • discrepancy between current control and required standard • prioritisation or ranking of a number of risks, where appropriate.
Hierarchy of control may include:	• eliminating hazards • and where this is not practicable, minimising risk by: • substitution • isolating the hazard from personnel

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RANGE STATEMENT	
	• using engineering controls • using administrative controls (e.g. procedures, training) • using personal protective equipment (PPE).
Factors impacting on the effectiveness of controls may include:	• cultural diversity • language • literacy and numeracy levels • shift work and rostering arrangements • training required • workplace culture related to OHS including commitment by managers and supervisors and compliance with procedures and training • workplace organisational structures (size of organisation, geographic, hierarchical).
Risk register may include:	• list of hazards, their location and people exposed • possible control measures and dates for implementation • range of possible scenarios or circumstances under which the hazards may cause injury or damage • results of the risk analysis related to the hazards.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

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Co-requisite units

Co-requisite units		

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BSBOHS505C Manage hazards in the work environment

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify hazards, and to assess and control risks in the work environment. It focuses on the knowledge, processes and techniques necessary to control specific hazards in the work environment. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Hazards may include noise, light, radiation, hazardous substances, dangerous goods, dusts and fibres, gravity (falls from heights), thermal environment, ergonomic hazards, manual handling, biological or psychosocial hazards or hazards arising from work organisation. Where the use of monitoring equipment is appropriate, useful underpinning skills are provided in BSBOHS406B Use equipment to conduct workplace monitoring. This unit differs from BSBOHS504B Apply principles of OHS risk management, which takes a generic approach to risk management and provides required knowledge and skills.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Access sources of information and data about the work environment to identify hazardous tasks or conditions	1.1. Access ***external sources of information and data*** to assist in identifying hazardous tasks or conditions for the selected ***hazard*** 1.2. Review ***workplace sources of information and data*** to assist in identification of hazardous tasks or conditions for the selected hazard 1.3. Use ***appropriate tools*** to identify hazardous tasks or conditions for the selected hazard 1.4. Use appropriate tools to conduct workplace inspections in consultation with stakeholders 1.5. Seek input from ***stakeholders***, ***key personnel*** and ***OHS specialists*** if required
2. Analyse the work environment to	2.1. Identify and appropriately use ***equipment*** and ***strategies*** required for basic workplace measurement

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ELEMENT	PERFORMANCE CRITERIA
assess risk	and monitoring of the selected hazard 2.2. Interpret results of workplace measurements in accordance with ***recognised standards*** 2.3. Seek input from stakeholders to clarify and confirm issues related to the selected hazard 2.4. Report results of workplace measurements and interpretations to stakeholders in a format easily understandable by the target group 2.5. Assess ***risks*** associated with identified hazards in the work environment in consultation with stakeholders and take into account effectiveness of existing controls 2.6. Identify and prioritise hazardous tasks or conditions requiring control action in consultation with stakeholders, taking account of recognised standards 2.7. Establish and update ***risk register*** as appropriate
3. Control risk associated with hazard	3.1. Seek information and data from external sources on control options for the specific hazard 3.2. Seek information and data from stakeholders and key personnel on control options for the specific hazard 3.3. Develop and advise a range of control options, in consultation with stakeholders and key personnel, by applying the ***hierarchy of control***, noting that ***personal protective equipment*** (PPE) is regarded as the least satisfactory control measure 3.4. Identify ***factors with a potential to impact on the effectiveness of controls*** 3.5. Develop control strategy for the selected hazard in consultation with stakeholders 3.6. Communicate outcomes of hazard identification, workplace monitoring and analysis, and the resultant control strategy to stakeholders and key personnel for action as appropriate
4. Monitor and review effectiveness of control strategy	4.1. Regularly review effectiveness of control strategy 4.2. Determine frequency, method and scope of review in consultation with workplace stakeholders and in accordance with workplace procedures 4.3. Seek input from stakeholders to review 4.4. Identify areas for improvement in the control of the selected hazard and make recommendations for improvement
5. Apply professional	5.1. Manage collection of information and data, reporting

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ELEMENT	PERFORMANCE CRITERIA
practice	of outcomes and maintenance of records in an ***ethical manner*** 5.2. Identify situations where OHS specialists may be required

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• analytical skills to:
  • identify areas for hazard control
  • analyse relevant workplace information and data
  • contribute to the assessment of the resources needed to systematically manage OHS and, where appropriate, access resources
• attention to detail when making observations and recording outcomes
• research skills to access relevant OHS information and data
• numeracy skills to carry out simple arithmetical calculations (e.g. % change), and to produce graphs of workplace information and data to identify trends and recognise limitations
• technological skills to use basic measuring equipment including reading scales and dials applicable to selected hazards
• communication skills to:
  • conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organization, OHS specialists and, as required, emergency services personnel
  • prepare reports for a range of target groups including OHS committee, OHS representatives, managers and supervisors
  • use language and literacy skills appropriate to the workgroup and the task
• consultation and negotiation skills to develop plans, and to implement and monitor designated actions
• project management skills to achieve change in OHS matters
• organisational skills to manage own tasks within a timeframe
• information technology skills to access and enter internal and external information and data on OHS and to use a range of communication media

Required knowledge
• organisational personnel at all levels

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REQUIRED SKILLS AND KNOWLEDGE
• OHS specialists and managers • report writing • location of information and data and advice from different sources to identify hazards • units of measurement to interpret measurement information and data • control strategies • software systems to assist in extraction, analysis and reporting of required information and data on specific hazards • word processing and other basic software for displaying visual information and data for reporting results and recommendations • relevant OHS legislation (acts, regulations, codes of practice, associated standards and guidance material)

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • hazard identification, analysis of the work environment and participation in the development of risk control for selected hazard types • knowledge of relevant OHS legislation (acts, regulations, codes of practice, associated standards and guidance material).
Context of and specific resources for assessment	Assessment must ensure: • reports from other parties consulted in identifying hazards and conducting risk assessments.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on the effectiveness of the hazard identification, risk assessment, control and management actions taken

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EVIDENCE GUIDE	
	• demonstration of techniques used to identify hazards; assess associated risks; control, monitor and evaluate risks • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of characteristics, mode of action and units of measurement of major hazard types • review of control strategies developed for the selected hazard • assessment of reports to stakeholders about the results of workplace measurements and interpretations.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
External sources of information and data may include:	• Australian Safety and Compensation Council • databases with national and state injury data such as National Industrial Chemicals Notification and Assessment Scheme (NICNAS) • employer groups • industry bodies • journals and websites • legislation, codes of practice and standards

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RANGE STATEMENT	
	• manufacturers' manual and specifications • OHS regulatory authorities • OHS specialists • unions

Hazards may include:	• source or a situation with a potential for harm in terms of:
	  • injury
	  • ill health
	  • damage to property
	  • damage to the environment
	  • a combination of the above

Workplace sources of information and data may include:	• employees • hazard, incident and investigation reports • material safety data sheets (MSDSs) • minutes of meetings • OHS representatives • reports and audits • workplace inspections
Appropriate tools may include:	• checklists produced as part of codes of practice • notes or drawings • photographs • tools developed for a specific work environment, situation or hazard • tools provided by external sources or advisors
Stakeholders may include:	• employees • health and safety, and other employee representatives • managers • OHS committees • supervisors
Key personnel may include:	• managers in related areas • people involved in OHS decision making or who are or affected by OHS decisions
OHS specialists may include:	• engineers • ergonomists • occupational hygienists • organisational psychologists • toxicologists • workplace injury and return to work advisors

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RANGE STATEMENT	
Equipment may include basic instrumentation such as:	• goniometer • humidity measuring devices • light meters • simple gas sampling devices • sound level meters • temperature measuring devices
Strategies may include:	• focus groups • interviews • questionnaires
Recognised standards may include:	• codes of practice • exposure standards • guidance notes • national and industry standards • OHS regulations
Risks may include:	• the chance of something happening that will result in injury or damage which are measured in terms of consequences (injury or damage) and likelihood of the consequence

Risk register may include:	• list of:
	  • hazards
	  • location of hazards
	  • people exposed to the hazards
	• possible control measures and dates for implementation
	• range of possible scenarios or circumstances under which these hazards may cause injury or damage
	• results of the risk assessment

Hierarchy of control may include:	• eliminating hazards • and where this is not practicable, minimising risk by: • substitution • isolating the hazard from personnel • using engineering controls • using administrative controls (e.g. procedures, training) • using PPE
Personal protective equipment is equipment designed to be worn by a person to provide protection	• clothing and footwear • face and eye protection • hand protection

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RANGE STATEMENT	
from hazards, and may include:	• head protection • hearing protection • respiratory protection
Factors with a potential to impact on effectiveness of controls may include:	• cultural diversity • geographic location • hierarchical structure • language • literacy and numeracy levels • shift work and rostering arrangements • size of organisation • training required • workplace culture related to OHS including commitment by managers and supervisors and compliance with procedures and training • workplace organisational structures (size of organisation, geographic, hierarchical)
Ethical manner may include:	• commercial-in-confidence information and data as appropriate • confidentiality • own currency of knowledge • privacy as appropriate

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBOHS506B Monitor and facilitate the management of hazards associated with plant

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively identify hazards, and to assess and control risks associated with plant and equipment, including mobile plant, machinery, electrical equipment, pressure vessels and plant affecting public safety. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for applying a systematic approach to monitoring the identification of hazards and assessing risk arising from the use of plant, and systems of work associated with plant. The focus is on eliminating the hazard or, where this is not practicable, minimising risks to health and safety arising from plant. The unit examines regulatory requirements for design, manufacture, testing, installation, commissioning, use, repair, alteration, dismantling, storage and disposal of plant. Identification and elimination of occupational health and safety (OHS) hazards at the design stage guides the selection and implementation of appropriate OHS risk controls throughout the life cycle of plant or equipment. BSBOHS504B Apply principles of OHS risk management, covers a generic approach to risk management and should be used as underpinning knowledge for this unit. While hazards associated with plant may include noise, chemicals and ergonomic hazards, these are specifically addressed under unit BSBOHS505C Manage hazards in

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	the work environment.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify hazards arising from the use of plant and associated systems of work	1.1. Access ***sources of information***, ***data and advice on plant and equipment hazards*** to assist in identifying hazards associated with ***plant*** 1.2. Identify ***hazards*** in the design, manufacture, registration, supply, installation, commissioning, use, maintenance, testing, dismantling, storage and

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ELEMENT	PERFORMANCE CRITERIA
	disposal of plant and ***systems of work associated with plant*** 1.3. Identify and analyse work environment, tasks and circumstances that may lead to hazardous situations or exacerbate risk associated with use of plant and equipment 1.4. In the process of hazard identification, identify and consult appropriate ***specialist advisors***, ***stakeholders***, relevant ***key personnel*** and other parties 1.5. Establish, report and review appropriate procedures for ***recording and reporting*** on hazards associated with plant as part of the systematic approach to managing OHS
2. Analyse OHS risk associated with plant	2.1. Determine the method of ***risk assessment*** in consultation with operators and stakeholders and, if required, specialist advisors 2.2. Identify and assess risks associated with hazards arising from plant in consultation with operators and stakeholders, taking into account the effectiveness of existing controls 2.3. Develop and regularly update ***risk registers*** for items of plant and associated equipment 2.4. Identify risks requiring further control action
3. Control risks associated with plant hazards	3.1. Source information, data and advice on risk control options for plant and machinery hazards 3.2. Involve operators, stakeholders and key personnel in the development of controls 3.3. Adopt control measures for ensuring the health and safety of persons accessing, using and/or maintaining plant by applying the ***hierarchy of control*** 3.4. Apply ***controls for access***, ***egress***, ***dangerous parts***, ***guarding***, ***operational controls***, ***emergency stops and warning devices***, ***registrations and design of plant***, ***and operator certification risks*** associated with plant 3.5. Use and maintain workplace monitoring processes to eliminate or control risks properly 3.6. Report regularly and appropriately to stakeholders
4. Identify and recommend controls for hazards associated with	4.1. Involve stakeholders and key personnel in the development of controls 4.2. Identify circumstances where ***permit to work procedures or certification*** are required to assist in

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ELEMENT	PERFORMANCE CRITERIA
maintenance activities and continued safe use of plant and equipment	ensuring a safe working environment 4.3. Respond to and monitor, permit to work procedures or certification in liaison with relevant key personnel, ensuring a safe working environment 4.4. Implement and monitor ***isolation procedures*** in liaison with relevant key personnel, to ensure continued safety of maintenance and ***other personnel*** 4.5. Ensure purchasing procedures include actions to address OHS implications of plant and equipment 4.6. Develop, document and communicate maintenance procedures to ensure plant and equipment are safe for use 4.7. Take action to ensure that any ***modifications to plant or equipment*** are safe and suitable for the task, and appropriately document and modify work practices as required for safe operation 4.8. Monitor and evaluate maintenance systems for effectiveness, suitability and accuracy to ensure safe operation of plant and equipment, and take action as appropriate
5. Identify and advise on licensing and certification issues associated with plant and equipment	5.1. Identify types of plant (including plant design) requiring ***registration*** and tasks requiring ***operator licensing and/or certification*** in accordance with legislative requirements 5.2. Document and communicate to managers and relevant key personnel, ***OHS requirements*** to meet plant registration, operator licensing and certification, and other legal requirements 5.3. Document and communicate to managers and key personnel, ***training requirements*** to meet ***licensing***, ***certification***, ***registration*** and ***other legal requirements*** 5.4. Analyse training needs to ensure information, instruction and training prior to commencement of work on new plant and equipment and new operating methods 5.5. Monitor and report compliance with regulatory requirements for operator licensing, registration and certification in the workplace 5.6. Identify, document and maintain appropriate records for statutory and specialist plant and associated operator competencies
6. Review and evaluate	6.1. Review effectiveness of control measures and

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ELEMENT	PERFORMANCE CRITERIA
risk control measures for plant	conduct risk assessments as appropriate 6.2. Compare outcomes of OHS risk assessments with criteria to identify risks requiring further risk control and risks deemed ***as low as reasonably achievable*** (***ALARA***) 6.3. Involve stakeholders, key personnel, operators and appropriate specialist advisors, in developing relevant risk control plans for plant 6.4. Maintain ***appropriate records*** for the operating of the plant 6.5. Recommend or implement improvements arising from the review process with appropriate key personnel including manufacturers 6.6. Review the system of managing OHS to ensure plant safety

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - identify areas for hazard control
  - analyse relevant workplace information and data and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
  - contribute to the assessment of resources needed to systematically manage OHS and, where appropriate, access resources
- attention to detail when making observations and recording outcomes
- research skills to access relevant OHS information and data
- numeracy skills to carry out simple arithmetical calculations (e.g. % change), and to produce graphs of workplace information and data to identify trends and recognise limitations
- technological skills to use basic measuring equipment including reading scales and dials applicable to selected hazards
- communication skills to:
  - conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as

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REQUIRED SKILLS AND KNOWLEDGE
required, emergency services personnel • prepare reports for a range of target groups including OHS committee, OHS representatives, managers and supervisors • use language and literacy skills appropriate to the workgroup and the task • consultation and negotiation skills to develop plans and to implement and monitor designated actions • project management skills to achieve change in OHS matters • organisational skills to manage own tasks within a timeframe • information technology skills to access and enter internal and external information and data on OHS and to use a range of communication media.
Required knowledge
• basic principles of incident causation and injury processes • concept of common law duty of care • difference between hazard and risk • ethics related to professional practice • hierarchy of control and considerations for choosing between different control measures, such as possible inadequacies of particular control measure • how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example: • communication skills • cultural background/workplace diversity • gender • labour market changes • language, literacy and numeracy • structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location • workers with specific needs • internal and external sources of OHS information and data • organisational OHS policies and procedures • language, literacy and cultural profile of the workgroup • legislative requirements for OHS information and data, and consultation • methods of providing evidence of compliance with OHS legislation • nature of workplace processes (including work flow, planning and control) and hazards relevant to the particular workplace • other functional areas that impact on the management of OHS • organisational behaviour and culture as it impacts on OHS and on change • organisational culture as it impacts on the workgroup • plant specific knowledge: • basic physics of fluids under pressure and pressure vessels, and the behaviour of pressurised fluid when pressure is released

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REQUIRED SKILLS AND KNOWLEDGE
• concepts of hazards arising from plant and systems of work associated with plant • hazards associated with mobile/fixed plant equipment and risk control strategies • industry practices related to permit to work, and isolation and tag out systems • registration requirements of plant, licensing and certification competencies • roles and responsibilities of employers, employees, supervisors, contractors, designers under OHS legislation • specific requirements under Australian Safety and Compensation Council guidance material • strategies for guarding moving parts in machinery, human factors related to machine guarding, safe design principles, features and limitations • principles and practices of systematic approaches to managing OHS • professional liability in relation to providing advice • requirements for record keeping that addresses OHS, privacy and other legislation • risk as a measure of uncertainty and the factors that affect risk • roles and responsibilities under OHS legislation of employees, including supervisors and contractors • state/territory and commonwealth OHS legislation (acts, regulations, codes of practice, associated standards and guidance material) including prescriptive and performance approaches and links to other relevant legislation such as industrial relations, equal employment opportunity, workers compensation, rehabilitation • structure and forms of legislation including regulations, codes of practice, associated standards and guidance material.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • monitoring and facilitating effective identification and control of hazards associated with plant and equipment • knowledge of relevant OHS legislation (acts, regulations, codes of practice, associated standards and guidance material).

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to manufacturers' manuals including specifications and operational information and data • access to relevant legislation, standards and guidelines • access to resources outlining a range of hazards and work situations (e.g. video, interactive CD, internet and other computer--based resources) • access to workplace equipment and resources • access to workplace or simulated workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on the effectiveness of hazard identification, risk assessment, control and management actions taken • demonstration of techniques used to identify hazards; assess associated risks; control, monitor and evaluate risks • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of strategies for guarding moving parts in machinery, human factors related to machine guarding, safe design principles, features and limitations • review of recording and reporting on hazards associated with plant • updating of risk registers for items of plant and associated equipment • review of the system for managing OHS.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS504C Apply principles of OHS risk management • BSBOHS505C Manage hazards in the work environment

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EVIDENCE GUIDE	
	• other OHS units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Sources of information**, **data and advice on plant and equipment hazards may include:	• audits • Australian Standards • employees and operators • employer groups, unions and industry bodies • hazard, incident and investigation reports • manufacturers' manuals and specifications • minutes of meetings • Australian Safety and Compensation Council • OHS professionals including those working in safety engineering, occupational hygiene, occupational health, injury management, toxicology, ergonomics and epidemiology • professional associations • questionnaires and surveys • relevant state/territory and commonwealth, OHS legislation, regulations, associated standards and codes of practice • reports • state and territory OHS regulatory bodies • workplace inspections
Plant may include:	• any machinery, equipment (including scaffolding), appliance, implement or tool and any other component, fitting or accessory • electrical installation and plant such as wiring, accessories, fittings, consuming devices, control and protective gear, converters and generators • fixed and or specified plant as related to

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RANGE STATEMENT	
	state/territory and commonwealth OHS legislation • mobile plant and load shifting equipment • pressure equipment such as boilers, pressure vessels and pressure piping

Hazards may include:	• source or a situation with a potential for harm in terms of:
	  • human injury or ill health
	  • damage to property
	  • damage to the environment
	  • a combination of the above

Systems of work associated with plant may include:	• documents describing how tasks, projects, inspections, jobs and processes are to be undertaken • management systems, such as fleet management, procurement, design and quality assurance • manufacturers' operations manuals • organisation policies and procedures addressing areas, such as operations, maintenance, purchasing • standard operating procedures
Specialist advisors may include:	• designers • engineers (such as design, acoustic, safety, mechanical, maintenance) • ergonomists • injury management personnel • manufacturers • occupational hygienists • suppliers and distributors
Stakeholders may include:	• employees • health and safety, and other employee representatives • managers • OHS committees • supervisors
Key personnel may include:	• maintenance and trades persons • managers • OHS representatives • supervisors

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RANGE STATEMENT	
	• users/operators • workplace trainers and assessors
Recording and reporting may include:	• documents describing how tasks, projects, inspections, jobs and processes are to be undertaken • job and task statements • job safety analysis worksheets • maintenance and service logs, sheets, cards, diaries • plant and equipment registers • policies and procedures underpinning systems of management, particularly OHS • purchasing and contracting procedures • quality system documentation • risk assessments • standard operating procedures
Risk assessment may include:	• any discrepancy between current controls and required standard and quality of control • current controls and their adequacy • identification and analysis of factors contributing to risk • prioritisation or ranking of risk where appropriate
Risk registers may include:	• list of hazards, their location and people exposed • possible control measures and proposed dates for implementation • range of possible scenarios or circumstances under which the hazards may cause injury or damage • results of risk assessments

Hierarchy of control may include:	• eliminating hazards
	• and where this is not practicable, minimising risk by:
	  • substitution
	  • isolating the hazard from personnel
	  • using engineering controls
	  • using administrative controls (e.g. procedures, training)
	  • using personal protective equipment (PPE)

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RANGE STATEMENT	

Controls for access and egress risks may include:	• accessing parts of plant which require cleaning and maintenance
	• access/egress to operator's workstation for normal and emergency conditions
	• systems to enable safe access and egress such as:
	  • emergency lighting
	  • safety doors
	  • alarm systems

Controls for dangerous parts risks may include:	• potential contact or entrapment points to which the operator may be exposed during:
	  • adjustment
	  • examination
	  • lubrication
	  • maintenance
	  • operation

Controls for guarding risk may include:	• permanently fixed physical barriers where no access of any part of a person is required • interlocking physical barriers where access to dangerous areas is required during operation • physical barriers securely fixed by means of fasteners or devices • presence-sensing safeguarding systems
Controls for operational controls plant risks may include:	• being capable of locking in 'off' position to enable disconnection of all motive power and forces • being guarded to prevent unintentional activation • being of 'fail safe' type • being readily and conveniently located • being suitability identified • having nature and function clearly indicated
Controls for emergency stops and warning devices risks may include:	• being able to avoid electrical or electronic circuit malfunction • colouring push buttons, bars or handles red • prominent, clear and durable markings
Controls for registrations and design of plant risks may include:	• relevant state and territory jurisdictional requirements
Controls for operator	• processes by which a certificate to use or operate industrial equipment is issued by a

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RANGE STATEMENT	
certification risks may include:	certifying authority

Permit to work procedures or certification may include:	• being authorised by a responsible or designated person directly in control of the work
	• certifications that appropriate precautions and controls are followed
	• checklists
	• conditions and actions such as frequency and duration of the work and atmospheric tests
	• documents containing approval to undertake work and activities including tests, measurements monitoring such as:
	  • hot work permits for welding and cutting in hazardous environments
	  • confined space entry

Isolation procedures may include:	• devices such as:
	  • isolating switches
	  • locks
	  • safety bars
	  • shields
	  • full pressure blanks
	  • spectacle blanks to lock controls - especially moving parts, equipment, systems or devices with stored energy - to an 'off' position while a worker is in a vulnerable position such as:
	  • performing maintenance on rotating equipment, and electrical and hydraulic systems
	  • locking switches with keys needed to open the lock
	• devices used in conjunction with a danger tag system that promotes greater safety consciousness among the workforce for all situations in which danger to persons could arise from:
	  • operation of machinery, plant or equipment
	  • flow of steam, electricity, gases or liquids
	  • use of faulty or unsafe plant and equipment
	• devices characterised by multiple locking systems that involve written authorisation by a competent person

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RANGE STATEMENT	
Other personnel may include:	• general community • other employees and contractors • public • visitors
Modifications to plant and equipment may include:	• changes in specification of raw material or plant operating materials, such as lubricants • changes to physical specification of plant, parts or associated tools • changes to work processes and systems • introduction of contractual arrangements • introduction of new and emerging technology
Registration may include:	• administrative process by which a certifying authority requires an organisation or industry to register plant, machinery and equipment

Operator licensing and/or certification may include:	• any form of regulation that restricts entry to an occupation or a profession to those who meet competency related requirements stipulated by a regulatory authority, including:
	  • any physical or implied licence
	  • registration
	  • certification
	  • approval
	  • permit that is required by a person in order to gain employment/self employment

OHS requirements may include:	• compliance, licensing and certification competencies for operators applicable to state/territory ad commonwealth legislation • documentation requirements relating to plant • emergency preparedness • incident investigation • OHS consultation and participation • OHS obligations and responsibilities to provide safe equipment • OHS policies and procedures • OHS training and information • purchasing/procurement policy and procedures • safe behaviour and defensive driving practices • safe work procedures • systematic hazard identification, risk analysis and evaluation, and risk control • task observation

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RANGE STATEMENT	
Training requirements may include:	• supervised and/or accredited training towards assessment for a particular certificate • training for safe use of plant or equipment

Licensing, ***certification and registration requirements*** may include:	• requirements of:
	  • relevant national and Australian Standards
	  • state and territory OHS legislation and codes of practice
	  • licensing and certification requirements applicable to state/territory and commonwealth legislation including OHS, dangerous goods, hazardous substances, mining and petrochemical

Other legal requirements may include:	• relevant state or territory transport regulations
As low as reasonably achievable (***ALARA***) is:	• a basic concept where risks are kept as low as is reasonably achievable
Appropriate records may include:	• compliance with legislative requirements • maintenance and modification records • noise and vibration analysis • risk assessments

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBOHS507B Facilitate the application of principles of occupational health to control OHS risk

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to facilitate the application of principles of occupational health and implement strategies to control occupational health and safety (OHS) risk. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for managing OHS in the workplace to consider the impact of agents in the workplace on the health of workers, and the physical and psychosocial impact on workers' health arising from work organisation and work processes. It covers knowledge of occupational health and strategies to deal with occupational health issues. The unit enables candidates to facilitate the application of principles of occupational health to control OHS risk in the workplace. OHS practitioners will identify occupational health hazards, and seek solutions and interventions to bring about change in the workplace. These practitioners will facilitate risk assessment and controls to reduce exposure to the effects of hazardous materials and hazardous conditions in the workplace. BSBOHS505C Manage hazards in the work environment, addresses hazards of both short term and long term latency, including those hazards that impact on health.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify the potential for adverse effects on health from agents in the workplace	1.1. Access ***external sources of information and data*** to assist in identifying ***agents*** in the workplace with a potential to adversely affect health 1.2. Review ***workplace sources of information and data*** to access information to assist in identifying agents in the workplace with a potential to adversely affect health 1.3. Consider the role of individual difference in susceptibility to occupational disease or injury in identifying adverse effects on health

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ELEMENT	PERFORMANCE CRITERIA
	1.4. Identify situations where ***health professionals*** may be required
2. Identify the potential for adverse effects on health related to the interaction of the work environment, work systems and people	2.1. Apply knowledge of sources of occupational disease and injury to analyse ***job characteristics***, ***nature of work*** and the ***context of work*** to help identify situations with potential for physical or psychological harm to employees 2.2. Access workplace and ***internal sources of information and data***, taking account of privacy requirements, to assist in identifying situations with a potential for physical or psychological harm to employees
3. Facilitate the control of risks to health in the workplace	3.1. Apply the ***hierarchy of control*** to control risks to occupational health 3.2. Examine workplace policies, procedures and schedules to minimise situations with a potential to cause physical or psychological harm to employees 3.3. Examine ***organisational communication processes*** to maximise clarity of roles and employee involvement in these processes
4. Participate in the development of strategies to communicate occupational health information and data	4.1. Research and identify ***characteristics of target groups*** 4.2. Interpret and discuss health effects with ***stakeholders*** that may result from work and the working environment 4.3. Implement communication strategies in accordance with ***legal*** and ***ethical requirements*** 4.4. Evaluate and monitor the effectiveness of health communication processes
5. Monitor and facilitate occupational health education and training	5.1. Identify the need for health information and data, and training in consultation with workplace stakeholders 5.2. Identify personnel including health professionals and ***resources*** to deliver occupational health training 5.3. Identify and allocate roles and responsibilities for the delivery of training 5.4. Provide health information and data, and education to managers and workers in a manner that facilitates understanding and uptake 5.5. Apply training, evaluation and monitoring processes
6. Review and evaluate the occupational	6.1. Evaluate outcomes and document the overall impact of occupational health education programs through

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ELEMENT	PERFORMANCE CRITERIA
health program	an ***evaluation plan*** 6.2. Evaluate and document the overall impact of the occupational health program 6.3. Make recommendations for future programs as a result of the evaluation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - identify areas for improvement where OHS risk is involved
  - analyse relevant workplace information and data, and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
  - contribute to the assessment of resources needed to systematically manage OHS and, where appropriate, access resources
- attention to detail when making observations and recording outcomes
- research skills to access relevant OHS information and data
- numeracy skills to carry out simple arithmetical calculations (e.g. % change), and to produce graphs of workplace information and data to identify trends and recognise limitations
- technological skills to use basic measuring equipment including reading scales and dials applicable to selected hazards
- communication skills to:
  - conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  - prepare reports for a range of target groups including OHS committee, OHS representatives, managers and supervisors
  - use language and literacy skills appropriate to the workgroup and the task
- consultation and negotiation skills to develop plans, and to implement and monitor designated actions
- project management skills to achieve change in OHS matters
- organisational skills to manage own tasks within a timeframe
- information technology skills to access and enter internal and external information and data on OHS and to use a range of communication media

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge

• basic knowledge of toxicology of hazardous materials and potential health effects in the workplace
• ethics related to professional practice
• formal and informal communication and consultation processes and key personnel related to communication
• hierarchy of control and considerations for choosing between different control measures, such as possible inadequacies of particular control measures
• how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:
  • communication skills
  • cultural background/workplace diversity
  • gender
  • labour market changes
  • language, literacy and numeracy
  • structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location
  • workers with specific needs
• internal and external sources of OHS information and data
• key personnel, including identifying 'change agents', within workplace management structure
• language, literacy and cultural profile of the workgroup
• methods of providing evidence of compliance with OHS legislation
• nature of workplace processes (including work flow, planning and control) and hazards relevant to the particular workplace
• organisational behaviour and culture as it impacts on OHS and on change
• organisational culture as it impacts on the workgroup
• organisational OHS policies and procedures
• requirements under hazard specific OHS legislation and codes of practice
• sources of occupational disease and their prevention
• structure and forms of legislation including regulations, codes of practice, associated standards and guidance material

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • facilitation of strategies to assist with controlling OHS risks associated with occupational health issues • knowledge of structure and forms of legislation including regulations, codes of practice, associated standards and guidance material.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to relevant legislation, standards and guidelines • access to workplace or simulated workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on the effectiveness of OHS principles in the workplace • demonstration of techniques used to control OHS risk • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of ethics related to professional practice • evaluation of discussions with stakeholders about health effects that may result from work and the working environment • review of evaluation plan • assessment of identification of situations that require health professionals.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
External sources of information and data may include:	• Australian Safety and Compensation Council • databases with national and state injury data, such as National Industrial Chemicals Notification and Assessment Scheme (NICNAS) • employer groups • industry bodies • journals and websites • legislation, codes of practice, associated standards and guidance material • manufacturers' manuals and specifications • OHS regulatory authorities • OHS specialists • unions.
Agents may include:	• biological • chemical • ergonomic • nuclear • physical • psychosocial • radiological.
Workplace sources of information and data may include:	• audits • employees • hazard, incident and investigation reports • material safety data sheets (MSDSs) • minutes of meetings • questionnaires • reports • written and verbal complaints.
Health professionals may include:	• general practitioners

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RANGE STATEMENT	
	• health educators • occupational health nurses • occupational health physicians.
Job characteristics and nature of work may include:	• adequacy of equipment or faulty equipment • effectiveness of different control strategies • health effects of physical hazards in the workplace such as noise, vibration, thermal extremes • job demands such as high physical, mental or emotional demands; lack of variety; short work cycle; workload • participation in decision making and control of workload • relative costs of implementation of appropriate control strategies • toxicology of hazardous materials • workload and scheduling issues such as pace; shift work, inflexible work schedules; unpredictable, long or unsocial hours • workplace processes and the hazards they produce.
Context of work may include:	• career issues including promotion, job security and skills • interpersonal relationships at work, including with supervisors and peers • organisational factors such as communication; levels of support for problem solving and personal development; changing employment patterns; definition of organisational objectives • role ambiguity, role conflict, role responsibilities.
Internal sources of information and data may include:	• human resources, industrial relations, personnel management and staff • managers • occupational health and employee assistance staff • OHS and employee representatives • supervisors.
Hierarchy of control may include:	• eliminating hazards • and where this is not practicable, minimising risk by:

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RANGE STATEMENT	
	• substitution • isolating the hazard from personnel • using engineering controls • using administrative controls (e.g. procedures, training) • using personal protective equipment (PPE).
Organisational communication processes may include:	• formal and informal communication processes • position descriptions and performance appraisal processes • training.

Characteristics of target groups may include:	• characteristics influencing communication strategies, such as access to information and data and empowerment
	• characteristics such as, but not limited to:
	  • cultural background
	  • language and literacy
	  • location
	  • size of workforce, group, team etc
	  • variability of roles, responsibilities etc.

Stakeholders may include:	• employees • families of employees • health and safety, and other employee representatives • local community • managers • OHS committees.
Legal requirements may include:	• equity and workers with specific needs • privacy legislation • relevant OHS legislative requirements related to use of certain chemicals and processes in the workplace.
Ethical requirements may include:	• confidentiality • equity • privacy • workplace diversity.
Resources may include:	• financial • physical.
Evaluation plan may include:	• appropriate communication strategies for the workplace • identification of relevant target groups

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RANGE STATEMENT	
	• impact on improvements to the workplace as a result of interventions • impact on workforce • training availability including delivery schedule • training content.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS508B Participate in the investigation of incidents

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to participate in the planning, conduct and reporting of investigations of incidents which have resulted in, or have a potential to result in, injury or damage. Situations may range from relatively minor through to major incidents. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for occupational health and safety (OHS) who are required to participate in the investigation of incidents for prevention. It includes conducting an initial assessment of the situation; establishing the scope and legal parameters of the investigation; conducting a systematic analysis to identify underlying causes and actions for prevention; and reporting on the outcomes of the investigation. This competency may be applied to both straightforward investigations as well as formal investigations of complex situations. Where the investigation is of a complex situation or the application of the skills and knowledge is in a larger organisation, procedures for incident investigation should exist. In smaller organisations there may not be existing investigation procedures and external OHS expertise should be accessed where required.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Facilitate initial assessment of the situation	1.1. Check area to ensure it is safe and that arrangements have been made to meet initial needs of those involved in the incident 1.2. Establish and maintain integrity of the site and personnel in accordance with legal requirements and to ensure objectivity of information collected 1.3. Identify statutory and legal obligations and, if required, advise ***relevant government agencies*** 1.4. Notify ***key persons within the organisation*** 1.5. Determine factors affecting the ***complexity*** of the

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ELEMENT	PERFORMANCE CRITERIA
	investigation 1.6. Identify ***stakeholders and interested parties***, and notify as appropriate
2. Participate in the establishment of investigation processes	2.1. Access and understand organisational policies and procedures for incident investigation 2.2. Convene ***investigation team*** appropriate to the level of the investigation 2.3. Define scope of the investigation taking account of legislative requirements 2.4. Facilitate involvement of interested parties in accordance with legislative requirements 2.5. Identify and source resources required to conduct the investigation, including the need for expert advice, if required 2.6. Identify and address ***barriers to investigation*** 2.7. Ensure action plans and time lines are developed by the investigation team
3. Collect information and data for analysis	3.1. Identify and access sources of information and data 3.2. Inspect incident site, equipment and other evidence 3.3. Facilitate information and data gathered by others 3.4. Take and record statements, photographs, measurements and documentary evidence, taking account of objectivity, confidentiality and legal implications 3.5. Appropriately secure site, evidence and all necessary documentation 3.6. Appropriately involve members of the investigation team
4. Analyse information and data gathered to identify immediate and underlying causes and practical prevention measures	4.1. Ensure the investigation team understands and identifies the ***conceptual basis for the analysis*** 4.2. Construcy ***time line of events*** leading up to incident 4.3. Research ***causative event/s*** 4.4. Identify ***conditions and circumstances*** that contribute to the causative event 4.5. Identify intervention points on the time line for prevention 4.6. Identify strategies to prevent the re-occurrence of the incident
5. Compile investigation report	5.1. Document results of analysis in a format to suit the required ***target audience*** and legal requirements

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ELEMENT	PERFORMANCE CRITERIA
	5.2. Phrase report in objective terms and cite evidence and reasons for conclusions 5.3. Include recommendations for prevention in report 5.4. Disseminate relevant information and data to key personnel, stakeholders and external agencies as appropriate, following appropriate authorisation 5.5. Use findings from the report to develop further prevention strategies

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - identify areas for improvement with OHS incidents
  - analyse relevant workplace information and data, and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
  - contribute to the assessment of resources needed to systematically manage OHS and, where appropriate, access resources
- attention to detail when making observations and recording outcomes
- research skills to access relevant OHS information and data
- numeracy skills to carry out simple arithmetical calculations (e.g. % change) and to produce graphs of workplace information and data, to identify trends and recognise limitations
- technological skills to use basic measuring equipment including reading scales and dials applicable to selected hazards
- communication skills to:
  - conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  - prepare reports for a range of target groups including OHS committee, OHS representatives, managers and supervisors
  - use language and literacy skills appropriate to the workgroup and the task
- consultation and negotiation skills to develop plans, and to implement and monitor designated actions
- project management skills to achieve change in OHS matters

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REQUIRED SKILLS AND KNOWLEDGE

- organisational skills to manage own tasks within a timeframe
- information technology skills to access and enter internal and external information and data on OHS and to use a range of communication media.

Required knowledge

- basic principles of incident causation and injury processes
- characteristics, mode of action and units of measurement of major hazard types
- concept of common law duty of care
- ethics related to professional practice
- formal and informal communication and consultation processes, and key personnel related to communication
- hierarchy of control and considerations for choosing between different control measures, such as possible inadequacies of particular control measures
- how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:
  - communication skills
  - cultural background/workplace diversity
  - gender
  - labour market changes
  - language, literacy and numeracy
  - structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location
  - workers with specific needs
- internal and external sources of OHS information and data
- organisational OHS policies and procedures
- language, literacy and cultural profile of the workgroup
- legislative requirements for OHS information and data, and consultation
- methods of providing evidence of compliance with OHS legislation
- nature of workplace processes (including work flow, planning and control) and hazards relevant to the particular workplace
- organisational culture as it impacts on the workgroup
- organisational OHS policies and procedures
- other functional areas that impact on the management of OHS
- principles and practices of continuity and validity of evidence retention for potential legal action
- principles and practices of systematic approaches to managing OHS
- requirements for record keeping that addresses OHS, privacy and other legislation
- requirements for reporting under OHS and other relevant legislation including notification and reporting of incidents
- requirements under hazard specific OHS legislation and codes of practice
- rights of OHS inspectors

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REQUIRED SKILLS AND KNOWLEDGE
• roles and responsibilities under OHS legislation of employees, including supervisors and contractors • standard industry controls for a range of hazards • state/territory and commonwealth OHS legislation (acts, regulations, codes of practice, associated standards&guidance material) including prescriptive and performance approaches and links to other relevant legislation such as industrial relations, equal employment opportunity, workers compensation, rehabilitation • structure and forms of legislation including regulations, codes of practice, associated standards and guidance material.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • investigation of OHS incidents in a systematic manner • an initial assessment of the situation and the establishment of processes • recommendations made for prevention • dissemination of relevant information and data • knowledge principles and practices of continuity and validity of evidence retention for potential legal action.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documents and situation case studies and, where possible, to situations • access to office equipment and resources • access to other personnel involved in investigations.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on incidents

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EVIDENCE GUIDE	
	• demonstration of techniques used to conduct OHS incident investigations • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of requirements for reporting under OHS and other relevant legislation including notification and reporting of incidents • review of authenticated documents from the workplace or training environment • evaluation of area checks after an incident • scoping of the investigation • recording of documentary evidence • researchof causative event/s.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant government agencies may include:	• environment protection agencies • OHS authorities • police and other emergency services
Key persons within the organisation may include:	• employee assistance personnel • external specialist personnel and contractors • OHS specialists within organisation • organisational legal advisor

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RANGE STATEMENT	
	• personnel involved in incident/situation • senior management • supervisors • union or staff association representatives • workgroup members
Complexity may include:	• administrative implications • conflict of interest issues • existence of secondary hazards • international conventions • involvement of external agencies • language competencies of parties involved • legal implications arising from the incident or post incident related matters • level of public or political interest • number of other parties, including sub-contractors • seriousness of injury or other outcomes • technical implications
Stakeholders and interested parties may include:	• community • coroner • designers • employees and family members • employers • government agencies, including OHS and emergency services agencies • importers • installers • insurance companies • managers • manufacturers • media • organisation's board or advisory council • persons in control of workplaces • politicians • sub-contractors • suppliers and distributors • unions • workgroup members and people who may be exposed to similar situations
Investigation team should include	• familiar with the task and the work

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RANGE STATEMENT	
persons:	environment • in authority in organisation such as company/organisational legal advisor and technical experts as required • in OHS representative role • responsible for performance standards within the work environment (e.g. supervisor) • with OHS expertise
Barriers to investigation may include:	• availability of research data and analysis or testing equipment • availability of technical design information and data relevant to the investigation • changes to incident scene • condition of witnesses • cultural issues • economic implications • geographical location and/or accessibility • lack of records • language • legal restrictions or limitations (temporary, short-term or long-term) • length of time from when incident occurred/first identified • limited resources available • management and employee attitude including desire to protect self and others • political and community stakeholder sensitivity • time limits imposed
Conceptual basis for the analysis should:	• emphasise analysis of the systems in place at the time of the incident • encourage an open minded, objective approach • focus on the 'why' and 'how' rather than the 'what' • not focus on individual behaviour or fault
Time line of events may include:	• events which extend back in time as far as required and not just focus on immediate events
Causative events may include:	• key events that together resulted in the particular outcome/s of injury or damage
Conditions may include:	• permanent situation such as: • type of equipment

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RANGE STATEMENT	
	• work practice • design of work environment

Circumstance may include:	• short-term situation that is relatively unusual, such as:
	  • storm
	  • key person absence

Target audience may include:	• board of management • external agencies • OHS committee • police or coroner • senior managers

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS509A Ensure a safe workplace

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish, maintain and evaluate the organisation's occupational health and safety (OHS) policies, procedures and programs in the relevant work area in accordance with OHS legal requirements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Managers play an important role in ensuring the safety of the workplace and the wellbeing of their staff. This unit applies to managers working in a range of contexts. It takes a systems approach and ensures compliance with relevant legislative requirements. All those who have, or are likely to have, a management responsibility for OHS should undertake this unit. It is relevant for those with managerial responsibilities, either as an owner or employee-manager of a business.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Establish and maintain an OHS system	1.1. Locate and communicate OHS policies which clearly express the organisation's commitment to implement relevant ***OHS legislation*** in the enterprise 1.2. Define OHS responsibilities for all workplace personnel in accordance with OHS policies, procedures and programs 1.3. Identify and approve financial and human resources for the effective operation of the OHS system
2. Establish and maintain participative arrangements for the management of OHS	2.1. Establish and maintain participative arrangements with employees and their representatives in accordance with relevant OHS legislation 2.2. Appropriately resolve issues raised through participative arrangements and consultation 2.3. Promptly provide information about the outcomes of participation and consultation in a manner accessible to employees
3. Establish and	3.1. Develop procedures for ongoing hazard

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ELEMENT	PERFORMANCE CRITERIA
maintain procedures for identifying hazards, and assessing and controlling risks	identification, and assessment and ***control of associated risks*** 3.2. Include hazard identification at the planning, design and evaluation stages of any change in the workplace to ensure that new hazards are not created by the proposed changes 3.3. Develop and maintain procedures for selection and implementation of risk control measures in accordance with the hierarchy of control 3.4. Identify inadequacies in existing risk control measures in accordance with the hierarchy of control and promptly provide resources to enable implementation of new measures 3.5. Identify intervention points for expert OHS advice
4. Establish and maintain a quality OHS management system	4.1. Develop and provide an OHS induction and training program for all employees as part of the organisation's training program 4.2. Utilise system for ***OHS record keeping*** to allow identification of patterns of occupational injury and disease in the organisation 4.3. Measure and evaluate the OHS system in line with the organisation's quality systems framework 4.4. Develop and implement improvements to the OHS system to achieve organisational OHS objectives 4.5. Ensure compliance with the OHS legislative framework so that legal OHS standards are maintained as a minimum

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytic skills to analyse relevant workplace data in order to identify hazards, and to assess and control risks • communication skills to consult with staff and to promote a safe workplace • problem-solving skills to deal with complex and non-routine difficulties • technology skills to store and retrieve relevant workplace data.

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge
• application of the hierarchy of control (the preferred order of risk control measures from most to least preferred, that is, elimination, engineering controls, administrative controls, personal protective equipment) • hazard identification and risk management • relevant legislation from all levels of government that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination • reporting requirements.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • detailed knowledge and application of all relevant OHS legislative frameworks • establishment and maintenance of arrangements for managing OHS within the organisations' business systems and practices • identification of intervention points for expert OHS advice • principles and practice of effective OHS management in a small, medium or large business.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports • demonstration of techniques

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EVIDENCE GUIDE	
	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of OHS policies, information provided on the OHS system, information about the outcomes of participation and consultation provided to employees • oral or written questioning to assess knowledge of OHS and OHS legislation • evaluation of OHS induction and training • review of OHS record keeping system.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units • units from the Diploma of Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
OHS legislation will depend on state/territory legislation and requirements, and will include:	• common law duties to meet general duty of care requirements • regulations and approved codes of practice relating to hazards in the work area • requirements for establishment of consultative arrangements including those for health and safety representatives, and health and safety committees • requirements for effective management of hazards • requirements for provision of information and training including training in safe operating procedures, procedures for workplace hazards, hazard identification, risk assessment and risk control, and emergency and evacuation

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RANGE STATEMENT	
	procedures • requirements for the maintenance and confidentiality of records of occupational injury and disease
Control of associated risks may include:	• administrative • counselling/disciplinary processes • elimination • engineering • housekeeping and storage • issue resolution • OHS records maintenance and analysis • personal protective equipment • purchasing of supplies and equipment • workplace inspections including plant and equipment
Organisational health and safety record keeping may relate to:	• audit and inspection reports • workplace environmental monitoring records • consultation e.g. meetings of health & safety committees, work group meeting agendas including OHS items and actions • induction, instruction and training • manufacturers' and suppliers' information including dangerous goods storage lists • hazardous substances registers • plant and equipment maintenance and testing reports • workers compensation and rehabilitation records • first aid/medical post records

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBOHS601B Develop a systematic approach to managing OHS

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively design and develop a systematic approach to managing occupational health and safety (OHS), which covers the systems, documentation, strategies and plans necessary to manage OHS and its evaluation in the workplace. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are required to effectively design and develop a systematic approach to managing OHS for a specific workplace to ensure it is, as far as is practicable, safe and without risks to the health of employees and others. This may include development and implementation of an OHS Management System (OHSMS). The unit covers analysing the workplace to clarify needs; selecting an appropriate standard; developing systematic approaches and associated documentation; and planning, supporting and monitoring the systematic approach.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Analyse the workplace to identify needs	1.1. Identify ***external motivators*** for development of ***systematic approaches to managing OHS*** in consultation with managers and other ***stakeholders*** 1.2. Identify ***internal motivators*** for development of systematic approaches to managing OHS 1.3. Identify ***workplace factors*** that may impact on the design and development of systematic approaches to managing OHS
2. Design integrated approaches to managing OHS	2.1. Review ***relevant standards***, codes of practice and guidance material that provide a basis for systematic approaches to managing OHS, in consultation with managers and other stakeholders 2.2. Define ***elements of systematic approaches to managing OHS*** to suit the workplace, in

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ELEMENT	PERFORMANCE CRITERIA
	consultation with stakeholders 2.3. Evaluate elements for compliance with ***legal obligations*** 2.4. Identify situations where ***OHS specialists*** and ***technical advisors*** may be required
3. Plan and develop integrated approaches to managing OHS	3.1. Develop ***policies and procedures*** to support systematic approaches to managing OHS, taking account of workplace factors 3.2. Identify and incorporate links with ***other functional areas and management systems*** 3.3. Identify and allocate relevant roles and responsibilities 3.4. Identify and document training needs for the introduction and ongoing maintenance of systematic approaches to managing OHS 3.5. Identify and document ***resources*** necessary to introduce and maintain systematic approaches to managing OHS 3.6. Develop a strategic implementation plan to manage OHS
4. Support planning for and implementation of integrated approaches to managing OHS	4.1. Determine priorities for action in consultation with managers and employee representatives 4.2. Develop action plans with allocated responsibilities and time lines 4.3. Provide advice and support to managers and other ***key personnel*** 4.4. Monitor implementation, in consultation with stakeholders, to ensure practicality, compatibility with other management systems and management practices, and acceptance of systematic approaches and support of programs by all levels of the organisation 4.5. Provide regular reports and feedback to key personnel, including recommendations for adjustment in the implementation
5. Evaluate the design and development of integrated approaches to managing OHS	5.1. Design the ***evaluation protocol*** in consultation with stakeholders 5.2. Develop a plan for collection of ***information and data*** 5.3. Analyse and evaluate information and data 5.4. Make recommendations for improvement in the systematic management of OHS as a result of the

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ELEMENT	PERFORMANCE CRITERIA
	evaluation findings 5.5. Provide a report to management on the outcomes of the evaluation and the recommendations for further development and improvement

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• analytical skills to:
  • identify areas for improvement with OHS incidents
  • analyse relevant workplace information and data, and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
  • contribute to the assessment of resources needed to systematically manage OHS and, where appropriate, access resources
  • contribute to the strategic OHS performance of the organisation
• attention to detail when making observations and recording outcomes
• research skills to access relevant OHS information and data, to interpret information and data, and to identify areas for improvement
• communication skills to:
  • conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  • write policies, procedures and plans
  • use language and literacy skills appropriate to the workgroup and the task
• data gathering skills such as brainstorming, polling, interviewing
• consultation and negotiation skills to develop plans, and to implement and monitor designated actions
• project management skills to achieve continuous improvement and to action processes in OHS matters
• organisational skills to manage own tasks within a timeframe
• information technology skills to access and enter internal and external information and data on OHS.

Required knowledge
• concept of common law duty of care

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REQUIRED SKILLS AND KNOWLEDGE

- development of tools such as positive performance indicators (PPIs) in assessment of OHS performance
- difference between common law and statutory law
- ethics related to professional practice
- formal and informal communication and consultation processes, and key personnel related to communication
- hierarchy of control and considerations for choosing between different control measures, such as possible inadequacies of particular control measures
- how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:
  - communication skills
  - cultural background/workplace diversity
  - gender
  - labour market changes
  - language, literacy and numeracy
  - structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location
  - workers with specific needs
- internal and external sources of OHS information and data
- key personnel, including identifying 'change agents', within workplace management structure
- language, literacy and cultural profile of the work group
- legislative requirements for OHS information and data, and consultation
- methods of providing evidence of compliance with OHS legislation
- nature and use of information and data that provides valid and reliable results on performance of OHS management processes (including PPIs and limitations of other types of measures)
- nature of workplace processes (including work flow, planning and control) and hazards relevant to the particular workplace
- organisational behaviour and culture as it impacts on OHS and on change
- organisational culture as it impacts on the workgroup
- organisational OHS policies and procedures
- other functional areas that impact on the management of OHS
- principles and practices of a systematic approach to managing OHS
- principles of duty of care including concepts of causation, foreseeability, preventability
- principles of effective meetings including agendas, action planning, chair and secretarial duties, minutes and action items
- principles of incident causation and injury processes
- professional liability in relation to providing advice
- requirements for record keeping that address OHS, privacy and other relevant

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REQUIRED SKILLS AND KNOWLEDGE
legislation • requirements for reporting under OHS and other relevant legislation including notification and reporting of incidents • requirements of OHS and standards related to systematically managing OHS • roles and responsibilities under OHS legislation of employees including supervisors, contractors, OHS inspectors • roles and responsibilities in relation to communication and consultation for OHS committees, OHS representatives, line management, employees and inspectors • state/territory and commonwealth OHS legislation (acts, regulations, codes of practice, associated standards and guidance material) including prescriptive and performance approaches and links to other relevant legislation such as industrial relations, equal employment opportunity, workers compensation, rehabilitation • structure and forms of legislation including regulations, codes of practice, associated standards and guidance material.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • design and development of systematic approaches to managing OHS, either in an actual workplace, or simulation exercise • products developed for the design and development of systematic approaches and associated documentation • how these products were designed and developed • use of these products • knowledge of relevant OHS legislation (acts, regulations, codes of practice, associated standards and guidance material).
Context of and specific resources for assessment	Assessment must ensure: • access to workplace or simulated workplace • access to workplace personnel and documentation • reports from other parties consulted in designing and

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EVIDENCE GUIDE	
	developing OHS systematic approaches • access to relevant legislation, standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on the effectiveness of the OHS management system • demonstration of techniques used to implement and maintain systematic OHS approaches • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of organisational behaviour and culture as it impacts on OHS and on change • review of strategic implementation plan and action plans • evaluation of elements for compliance with legal obligations • analysis and evaluation of information and data • review of recommendations made for improvement in the systematic management of OHS.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and

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RANGE STATEMENT	
regional contexts) may also be included.	
External motivators may include:	• corporate image/reputation • customer/contract demand • legal obligations
Systematic approaches to managing OHS may include:	• developing, implementing, reviewing and maintaining the activities for managing OHS • use of OHS management systems developed in the workplace to meet the OHS situation in that particular workplace
Stakeholders may include:	• employees • health and safety, and other employee representatives • managers • OHS committees • supervisors
Internal motivators may include:	• financial • industrial relations • injury and illness prevention (ethical)
Workplace factors may include:	• consultation and communication processes • management commitment • management style, and OHS knowledge and skills of organisation • nature of hazards and level of risk • organisational structure • other management systems requiring interface or integration with systematic approaches to managing OHS • resources available • staff profile including language, literacy and numeracy, cultural diversity and specific needs of employees • whether certification is required • workplace culture, including industrial relations and safety culture
Relevant standards may include:	• Australian Standards • industry standards • standards developed by OHS authorities
Elements of systematic approaches to managing OHS may include:	• list of key requirements or major principles that are combined in a methodical and ordered manner to minimise the risk of injury or ill

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RANGE STATEMENT	
	health in the workplace, for example: • allocation of resources • communication and consultation • hazard management • processes of OHS planning • record keeping and reporting • review and evaluation for ongoing improvement of OHS • training and competency
Legal obligations may include:	• equity • freedom of information • industrial relations • OHS • privacy • trade practices • workplace diversity
OHS specialists may be include:	• ergonomists • health professionals • injury management advisors • occupational hygienists
Technical advisors may include:	• engineers (such as design, acoustic, safety, mechanical, civil) • legal practitioners • maintenance and trades persons • workplace trainers and assessors
Policies and procedures may include:	• documents describing how tasks, projects, inspections, jobs and processes are to be undertaken • job/task statements • policies and procedures underpinning OHS • purchasing and contracting procedures • quality system documentation • standard operating procedures
Other functional areas and management systems may include:	• engineering and maintenance • environmental management • finance and auditing • human resources, industrial relations and personnel management, including payroll • information, data and records management

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RANGE STATEMENT	
	• logistics • purchasing, procurement and contracting • quality management • strategic planning
Resources may include:	• equipment • financial requirements • personnel, including time allocation • specialised resources
Key personnel may include:	• those people who have a key role in OHS including managers, supervisors, OHS representatives and other functional areas
Evaluation protocol may include:	• criteria for evaluation • how the criteria will be measured • how the information and data will be collected • time period for collection of information and data
Information and data may include:	• audit reports • feedback from questionnaires • minutes of meetings • workplace inspections • workshops

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

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Co-requisite units

Co-requisite units		

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BSBOHS602B Develop OHS information and data analysis and reporting and recording processes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to design and develop occupational health and safety (OHS) information and data analysis, and reporting and recording processes that inform and contribute to the effectiveness of OHS in the workplace, and to evaluate the effectiveness of these processes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This work applies to a formal OHS management system or other systematic approaches to managing OHS. The information and data system covers analysing workplace information and data in a systematic manner to ensure effective measurement and evaluation of OHS performance, with the objective of improving the management of OHS. This includes informing management and other stakeholders about OHS performance and meeting legislative requirements regarding the use, distribution and maintenance of records under relevant statutory provisions. This unit covers the design and development of a system for managing the collection, analysis and dissemination of OHS information and data, statistics and records, and is therefore more complex than BSBOHS502B Participate in the management of the OHS information and data systems, which addresses the management of an already developed OHS information and data system.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify requirements for OHS information and data	1.1. Review ***relevant legislation*** and ***standards*** to identify obligations relevant to OHS information and data 1.2. Access policies and procedures to identify requirements for OHS information and data 1.3. Determine priorities, in consultation with relevant ***stakeholders***, for OHS information and data collection and management 1.4. Identify ***workplace factors*** that may impact on the design and development of OHS information and

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ELEMENT	PERFORMANCE CRITERIA
	data processes 1.5. Make recommendations for appropriate indicators of OHS performance 1.6. Ensure draft requirements for OHS information and data are developed, in consultation with relevant stakeholders
2. Make recommendations for the design of the OHS information and data processes	2.1. Identify and access relevant ***sources*** and ***types of OHS information and data*** 2.2. Investigate ***formats*** for, and availability of, databases to identify the most appropriate format 2.3. Address legal and ***ethical requirements*** in recommendations 2.4. Recognise limits of own professional expertise and seek advice from ***relevant specialists*** as required 2.5. Prepare specifications for the OHS information and data processes
3. Develop the OHS information and data, and reporting and recording processes	3.1. Identify and access or develop, ***tools*** for recording and collating information and data recognising the limitations of information and data, and measurement indices, and controlling for potential biases 3.2. Identify and facilitate links with ***other functional areas and management systems*** to ensure comprehensive information and data collection 3.3. Identify and allocate relevant roles and responsibilities 3.4. Develop policies, procedures and tools for collecting, collating and recording workplace OHS information and data, taking account of workplace factors and system requirements 3.5. Identify and document training needs for collecting, collating and analysing OHS information and data 3.6. Identify ***resources*** necessary for collecting, collating, recording, analysing and distributing OHS information and data
4. Record and analyse information and data to monitor OHS performance and to evaluate methods of prevention	4.1. Identify and apply ***descriptive and analytical techniques*** for systematic evaluation of OHS performance monitoring (including ***positive performance indicators*** [PPIs]) and areas for improvement 4.2. Access and apply ***information and data*** to determine potential associations between workplace

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ELEMENT	PERFORMANCE CRITERIA
	hazards and their adverse effects on exposed workers 4.3. Record information and data to assist with identifying patterns of occupational injury and disease within particular areas 4.4. Ethically manage information and data collection, recording, analysis and application 4.5. Critically evaluate OHS information and data to ensure accuracy, reliability, relevance and ***validity*** 4.6. Appropriately format and disseminate outcomes of information and data analysis considering the target audience, and legal and ethical requirements 4.7. Identify appropriate strategies for improvement and formulate recommendations as a consequence of information and data analysis
5. Monitor and evaluate the effectiveness of information and data collection and analysis processes	5.1. Regularly review OHS information and data collection, recording, analysis and application processes to ensure relevance to the needs of the organisation in managing OHS and compliance with legislative requirements 5.2. Determine frequency, method and scope of review, in consultation with stakeholders 5.3. Make recommendations for improvement to OHS information and data processes as required 5.4. Implement improvement strategies arising from the review

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• analytical skills to:
  • analyse relevant workplace information and data, and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
  • contribute to the assessment of resources needed to systematically manage OHS and, where appropriate, access resources

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REQUIRED SKILLS AND KNOWLEDGE

- contribute to the strategic OHS performance of the organisation
- attention to detail when making observations and recording outcomes
- numeracy skills to:
  - carry out simple arithmetical calculations (e.g. % change) and to produce graphs of workplace information and data, to identify trends and recognise limitations of information and data
  - carry out simple statistical analysis e.g. mean, standard deviation, regression
- research skills to access relevant OHS information and data, to interpret information and data, and to identify areas for improvement
- communication skills to:
  - conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  - employ consultation and negotiation skills, particularly in relation to developing plans, and implementing and monitoring designated actions
  - write policies, procedures and plans
  - use language and literacy skills appropriate to the workgroup and the task
- consultation and negotiation skills to develop plans, and to implement and monitor designated actions
- data gathering skills such as brainstorming, polling, interviewing
- project management skills to achieve continuous improvement and to conduct action planning processes in OHS matters
- organisational skills to manage own tasks within a timeframe
- information technology skills to access and enter internal and external information and data on OHS, and to produce effective graphical representations.

Required knowledge

- concept of common law duty of care
- development of tools such as PPIs in assessment of OHS performance
- difference between common law and statutory law
- ethics related to professional practice
- examples of OHS information and data management systems and tools
- formal and informal communication and consultation processes, and key personnel related to communication
- how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:
  - communication skills
  - cultural background/workplace diversity
  - gender
  - labour market changes
  - language, literacy and numeracy

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REQUIRED SKILLS AND KNOWLEDGE

- structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location
- workers with specific needs
- key personnel, including identifying change agents, within workplace management structure
- organisational OHS policies and procedures
- language, literacy and cultural profile of the workgroup
- legislative requirements for OHS information and data, and consultation
- methods of collecting reliable information and data, commonly encountered problems in collection, and strategies for overcoming such problems
- nature and use of information and data that provides valid and reliable results on performance of OHS management processes (including PPIs) and limitations of other types of measures
- organisational culture as it impacts on the workgroup
- other functional areas that impact on the management of OHS
- principles and practices of a systematic approach to managing OHS
- principles and practices of continuity and validity of evidence retention for potential legal action
- principles of duty of care including concepts of causation, foreseeability, preventability
- requirements for record keeping that address OHS, privacy and other relevant legislation
- requirements for reporting under OHS and other relevant legislation including notification and reporting of incidents
- requirements of effective records management systems including collection, filing, retention, retrieval, archiving and disposal
- requirements of OHS and standards related to systematically managing OHS
- roles and responsibilities under OHS legislation of employees including supervisors, contractors, OHS inspectors
- roles and responsibilities in relation to communication and consultation for OHS committees, OHS representatives, line management, employees and inspectors
- standards related to OHS information and data, statistics and records management including requirements for information and data under elements of systematically managing OHS
- state/territory and commonwealth OHS legislation (acts, regulations, codes of practice, associated standards and guidance material) including prescriptive and performance approaches and links to other relevant legislation such as industrial relations, equal employment opportunity, workers compensation, rehabilitation
- structure and forms of legislation including regulations, codes of practice, associated standards and guidance material
- internal and external sources of OHS information and data.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • design and development of processes for OHS information and data collection, analysis, and reporting and recording, either in an actual workplace or simulation exercise • products developed for design and development of an OHS information and data system • how these products were designed and developed • use of these products • knowledge of legislative requirements for OHS information and data, and consultation.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace information and data • reports from other parties consulted in developing OHS information and data collection, reporting and recording, analysis and monitoring processes • access to information and databases for analysis activities • access to relevant legislation, standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on the effectiveness of the OHS data analysis, reporting and recording • demonstration of techniques used to record, analyse and report on OHS information • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of

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EVIDENCE GUIDE	
	principles of duty of care including concepts of causation, foreseeability, preventability • review of recommendations made for indicators of OHS performance • evaluation of specificationspreparedfor the OHS information and data processes • evaluation of ethical management of information and data collection, recording, analysis and application • assessment of recommendations made for improvement to OHS information and data processes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant legislation may include:	• equity and workplace diversity • freedom of information • OHS, including serious injury and incident reporting • privacy • trade practices • workers compensation
Standards may include:	• Australian Safety and Compensation Council • international, Australian or industry standards • standards developed by OHS authorities
Stakeholders may include:	• employees • health and safety, and other employee representatives • management

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RANGE STATEMENT	
	• OHS committees • supervisors

Workplace factors may include:	• management commitment
	• management style and OHS knowledge and skills of organisation
	• nature of hazards and level of risk
	• organisational structure
	• other management systems requiring interface or integration with the information and data processes for OHS
	• required level of security for OHS system, including:
	  • prevention of theft and fraud
	  • access security
	  • prevention of interruption of services inadvertent release of material
	  • information and data destruction, corruption and alteration
	• resources available
	• size of organisation and industry type
	• staff profile including:
	  • language
	  • literacy
	  • numeracy
	  • cultural diversity
	• workplace culture, including industrial relations and safety culture

Sources of OHS information and data may include:	• external sources such as:
	  • Australian and industry standards
	  • Australian Bureau of Statistics (ABS)
	  • Australian Safety and Compensation Council
	  • internet, journals and magazines
	  • manufacturers' manuals and specifications
	  • OHS authorities
	  • OHS legislation, codes of practice and guidance material
	  • OHS professional bodies
	  • research literature
	  • technical information and data

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RANGE STATEMENT	

	• unions and industry bodies
	• internal sources such as:
	  • employee information papers, brochures, notes and newsletters
	  • employees
	  • insurance and incident investigation records
	  • manufacturers' manuals
	  • material safety data sheets (MSDSs) and registers
	  • OHS policies and procedures
	  • OHS positive performance indicators
	  • OHS reports including, workplace inspections, hazard and incident reports, technical reports, consultations and observations
	  • risk assessments (past and present)
	  • safety handbooks
	  • work instructions, job system analysis (JSA) and work system analysis
	  • workers compensation data

Types of OHS information and data may include:	• certification, registration and licensing • correspondence with agencies • enforcement notices and actions • ergonomic information and data, such as job and task analysis • incident reports, including reports on: near misses, hits, incidents, injuries, first aid, illness, disease, dangerous occurrences • inspections • lost time reports and summaries • medical records • occupational health information and data • OHS PPIs • performance appraisal and training records, including: instruction and supervision logs, diaries, workbooks • plant maintenance and servicing records • rectification action reports and plans • records of plant stoppages • records of load shifting equipment and tools, such as elevated work platforms (EWP) and

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RANGE STATEMENT	
	explosive powered tools • registers, such as: hazards, risk, hazardous substances, dangerous goods, MSDSs, confined spaces • rehabilitation information, including case management • reports for committees • reports from OHS consultants • reports of proposed changes that may affect OHS • research results • results of tests, measurements and analyses, for example noise and air • results of workplace environmental monitoring such as occupational, industrial hygiene monitoring, health screening and surveillance • risk assessments • risk management records • safety manuals for plant and tools • sickness absence records • training records, including records of competencies to operate plant • workers compensation records • workers' individual histories of exposure to specific substances, such as lead, asbestos, benzene and vinyl chloride • workplace procedure manuals
Formats may include:	• electronic information and data management systems, where system refers to computer software, hardware, users and other elements • paper-based systems such as cards, files, registers and spreadsheets
Ethical requirements may include:	• access to personal records • confidentiality • privacy
Relevant specialists may include:	• emergency services personnel who may need to access hazardous substances and dangerous goods information and data • ergonomists • health professionals • information and data technology and database management support

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RANGE STATEMENT	
	• injury management advisors • legal practitioners • medical and first aid personnel who may need to access relevant medical records and hazardous substances information and data • occupational hygienists
Tools may include:	• available system of backup/archiving/storage/disposal • handbooks • performance monitoring charts and checklists • registers • software for information and data recording and analysis
Other functional areas and management systems may include:	• engineering and maintenance • environmental management • finance and auditing • human resources, industrial relations and personnel management including payroll • information, data and records management • logistics • purchasing, procurement and contracting • quality management • strategic planning
Resources may include:	• equipment • financial requirements • personnel, including time allocation • specialised resources, such as electronic information and data management system, communications media and information/data technology equipment
Descriptive and analytical techniques may include statistical tests and methods such as:	• broad analytical studies to determine estimates of risk • making comparisons using basic tests of significance • means, standard deviation, regression analysis and percentage change
Positive performance indicators may include:	• focusing on assessing how successfully a workplace is performing through measuring OHS processes
Information and data may	• epidemiological studies such as: • descriptive studies examining who, what,

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RANGE STATEMENT	
include:	where, when, why - distribution and frequency • analytical studies attempting to analyse cause or determinants of disease by testing a hypothesis • experimental or intervention approaches such as clinical and community trials • evaluation of particular occupational health programs • industry information and data • organisational information and data
Validity may include a reflection of the true state of a test result and includes tests for systematic distortions such as:	• confounding bias • information/data bias • observational bias • recall bias • selection bias

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS603B Analyse and evaluate OHS risk

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to conduct a formal risk assessment comprising analysis and evaluation of occupational health and safety (OHS) risk. It has been designed to be consistent with the Australian Standard, AS/NZS 4360: 2004 Risk management. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit addresses the knowledge, processes and techniques necessary to analyse and evaluate OHS risk as part of the risk management process. OHS risk analysis involves defining the range of consequences, assessing the effectiveness of existing controls and deciding the likelihood of each consequence, and combining these in some way to obtain a level of risk. Risk evaluation is the comparison of pre established criteria for tolerance and the subsequent ranking of risks requiring control. The situation to be analysed and evaluated may involve a single task or a process comprising a series of tasks. Application of this unit must be consistent with the pertinent sections of the Australian Standard, AS/NZS 4360: 2004 Risk management.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Define parameters of the OHS risk study	1.1. Access information and data on the ***hazard*** identification process and the ***context*** of the OHS risk 1.2. Establish the ***scope of the OHS risk study*** 1.3. Divide the activity to be analysed into logical and manageable elements 1.4. Define and document the method of OHS risk analysis
2. Analyse the OHS risk of a task or	2.1. Clarify the nature of the hazard including the process of injury or damage

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ELEMENT	PERFORMANCE CRITERIA
process	2.2. Identify the need for further information using ***monitoring activities***
	2.3. Communicate ***information and data about the OHS risk*** to ***stakeholders***
	2.4. Consult and involve a range of stakeholders in the analysis
	2.5. Identify and evaluate existing ***controls*** and their effectiveness, taking account of ***relevant standards***
	2.6. Determine specific scenarios to be considered
	2.7. Determine the range of possible consequence/s from the various scenarios
	2.8. Determine the likelihood of the occurrence of the consequence/s
	2.9. Undertake steps to ensure ***comprehensive analysis of information, data and techniques***
	2.10. Rank OHS risks in order of level of risk
	2.11. Consult ***OHS specialist advisors*** if required
3. Evaluate OHS risk of a task or process	3.1. Access and reference relevant legislation, codes of practice and standards
	3.2. Consult stakeholders in determining criteria for OHS risk evaluation
	3.3. Compare outcomes of OHS risk analysis with criteria to identify risks requiring further risk control and risks deemed as low as reasonably achievable
	3.4. ***Document*** process and outcomes of ***analysis*** and ***evaluation*** in a manner that is accessible and facilitates understanding by stakeholders
	3.5. Document outcomes to include explanation of the legal ramifications of decision making based on risk prioritisation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to:

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REQUIRED SKILLS AND KNOWLEDGE

- identify areas for improvement with OHS incidents
- analyse relevant workplace information and data, and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
- contribute to the assessment of resources needed to systematically manage OHS and, where appropriate, access resources
- contribute to the strategic OHS performance of the organisation
- attention to detail when making observations and recording outcomes
- numeracy skills to carry out simple arithmetical calculations (e.g. % change) and to produce graphs of workplace information and data, to identify trends and recognise limitations of information and data
- research skills to access relevant OHS information and data to interpret information and data, to identify areas for improvement
- communication skills to:
  - conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  - write policies, procedures and plans
  - use language and literacy skills appropriate to the workgroup and the task
- data gathering skills such as brainstorming, polling, interviewing
- consultation and negotiation skills to develop plans, and to implement and monitor designated actions
- project management skills to achieve continuous improvement and action processes in OHS matters
- organisational skills to manage own tasks within a timeframe
- information technology skills to access and enter internal and external information and data on OHS and to use a range of media.

Required knowledge

- benefits, limitations and use of a range of communication strategies and tools appropriate to the workplace
- difference between hazard and risk
- ethics related to professional practice
- formal and informal communication and consultation processes, and key personnel related to communication
- how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:
  - communication skills
  - cultural background/workplace diversity
  - gender
  - labour market changes

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REQUIRED SKILLS AND KNOWLEDGE

- language, literacy and numeracy
- structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location
- workers with specific needs
- internal and external sources of OHS information and data
- language, literacy and cultural profile of the work group
- legislative requirements for OHS information and data, and consultation
- limitations of generic hazard and risk checklists and risk ranking processes
- nature of workplace processes (including work flow, planning and control) and hazards relevant to the particular workplace
- organisational behaviour and culture as it impacts on OHS and on change
- organisational culture as it impacts on the workgroup
- organisational OHS policies and procedures
- other functional areas that impact on the management of OHS
- pertinent sections of relevant Australian and other standards such as AS/NZS 4360: 2004 Risk management, National Standard for the Storage and Handling Workplace Dangerous Goods [NOHSC: 1015(2001)] and National Standard for Manual Handling [NOHSC: 1001 (1990)]
- principles and practices of a systematic approach to managing OHS
- principles of duty of care including concepts of causation, foreseeability, preventability
- principles of human behaviour and response to interactions with human, physical and task environment to identify psychosocial hazards
- principles of incident causation and injury processes
- range of risk analysis/assessment techniques and tools and their application and limitations
- requirements for control of work permits/written authorities in workplace monitoring activities
- requirements of OHS and standards related to systematically managing OHS
- risk as a measure of uncertainty and the factors that affect risk
- roles and responsibilities under OHS legislation of employees including supervisors, contractors, OHS inspectors
- roles and responsibilities in relation to communication and consultation for OHS committees, OHS representatives, line management, employees and inspectors
- sources of occupational disease and their prevention
- standard industry controls for a range of hazards
- state/territory and commonwealth OHS legislation (acts, regulations, codes of practice, associated standards and guidance material) including prescriptive and performance approaches and links to other relevant legislation such as industrial relations, equal employment opportunity, workers compensation, rehabilitation
- structure and forms of legislation including regulations, codes of practice, associated standards and guidance material

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REQUIRED SKILLS AND KNOWLEDGE
• toxicology of hazardous materials and potential health effects in the workplace • types of hazard identification tools including job system analysis (JSA).

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • OHS risk analysis and evaluation of a number of tasks as part of an OHS risk management process, either in an actual workplace, simulation exercise or scenario • products developed for management of these OHS processes • how these products were developed • use of the products • knowledge of pertinent sections of relevant Australian and other standards.
Context of and specific resources for assessment	Assessment must ensure: • access to actual workplace/s and stakeholder groups • access to office equipment and resources • access to relevant legislation, standards and guidelines • access to workplace documentation • access to reports from other parties consulted in conducting risk analysis and evaluation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques used to identify, analyse, evaluate, control and monitor risks • direct questioning combined with review of portfolios of evidence and third party reports of

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EVIDENCE GUIDE	
	on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning • review information and data communicated to stakeholders about the OHS risk • evaluation of ranking of OHS risks • assessment of comparison of outcomes of OHS risk analysis with criteria • review of documentation of process and outcomes of analysis and evaluation of OHS risk of a task or process.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Hazards may include:	• source or situation with a potential for harm in terms of human injury or ill health, damage to property or the environment, or a combination of these
Context may include:	• activities • controls currently in place • internal and external factors that impact on OHS risk • level of documentation required • stakeholders • workplace
Scope of OHS risk study may	• activities, job role, area, location to be

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RANGE STATEMENT	
include:	analysed • who will use the output and for what purpose • why it is being done
Monitoring activities may include:	• air monitoring • medical monitoring • noise monitoring
Information and data about the OHS risk may include:	• mode/s of action of the hazard causing injury or damage • outcomes of OHS risk analysis
Stakeholders may include:	• customers/users of the product or process • employees and their representatives • managers, including boards of management • the community
Controls may include:	• actions implementing risk management decisions • monitoring • programs or policies • re-evaluation and compliance with decisions
Relevant standards may include:	• Australian and industry standards • codes of practice and guidance material • common law duty of care • current knowledge • current practice • legislation
Comprehensive analysis of information and data may include:	• engineering modelling • experience with enterprise, own/other industries • past records • published literature • research within exposed groups • specialist and expert groups
Comprehensive analysis of techniques may include:	• broad consultation • multidisciplinary focus groups • processes and techniques used by specialists, such as modelling, fault tree and Hazard and Operability Studies (HazOps) • questionnaires • structured interviews
OHS specialist advisors may	• engineers

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RANGE STATEMENT	
include:	• ergonomists • occupational hygienists • safety professionals • occupational health practitioners • psychologists • people skilled in applying advanced risk analysis processes, such as modelling, fault tree, HazOps and Management Oversight and Risk Tree (MORT) • toxicologists
Documentation of risk analysis may include:	• description of methods used • groups involved/consulted • description of consequences and their likelihood • information and data used in estimates • assumptions • effectiveness of existing controls • uncertainty in analysis • factors affecting level of risk • further information/data and/or investigation required
Documentation of risk evaluation may include:	• criteria determined • descriptions of method used to determine the criteria • groups consulted/involved • list of risks and schedule for action • statement of the legal ramifications of decision making based on risk prioritisation

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS604B Apply ergonomic principles to control OHS risk

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to apply ergonomic knowledge, principles and techniques to control occupational health and safety (OHS) risk. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit addresses the principles, processes and techniques of ergonomics including the study of the interaction between people, the equipment they use and their general environment. The unit focuses on aspects of work design and work planning such as work layout, work flow, skills, individual variations and environmental factors. The underpinning knowledge and skills required for this unit are outlined in BSBOHS504B Apply principles of OHS risk management, and BSBOHS505C Manage hazards in the work environment, and include knowledge of systematic approaches to OHS.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Assess the degree of match between people and their activities, equipment, environment and systems	1.1. Identify the extent of human variability in the organisation 1.2. Determine demands placed on people in the organisation by their activities, equipment, environment and systems 1.3. Determine people's capacity to interact optimally with their activities, equipment, environment and systems 1.4. Determine the match between people and their activities, equipment, environment and systems 1.5. Identify ***specialist advisors*** and relevant ***stakeholders*** for ***sources of information and data***, and consult them during the assessment process
2. Design ergonomic	2.1. Identify ***ergonomic interventions*** in the design

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ELEMENT	PERFORMANCE CRITERIA
interventions to enhance the match between people and their activities, equipment, environment and systems	process to optimise the match between people and their activities, equipment, environment and systems 2.2. Design the work environment to optimise the match between people, their activities, equipment, environment and systems 2.3. Use ***tools and databases*** to assess tasks and designs to minimise risk 2.4. Make recommendations to optimise the integration of controls and display the decision making processes within the work system
3. Implement ergonomic interventions to enhance the match between people and their activities, equipment, environment and systems	3.1. Provide advice on the impact of ***legislation***, ***codes of practice and standards*** on the selection and implementation of ergonomic interventions 3.2. Consult ***key personnel***, stakeholders and users when developing, selecting and implementing ergonomic interventions 3.3. Make links with ***other functional areas and management systems*** 3.4. Facilitate implementation of the agreed intervention 3.5. Identify and document training needs 3.6. Identify and document ***resources*** necessary to introduce and maintain the agreed interventions 3.7. Report the outcomes of ergonomic assessments and interventions to key personnel and stakeholders
4. Evaluate ergonomic interventions	4.1. Evaluate quality and outcomes of ergonomic interventions in consultation with stakeholders and users 4.2. Facilitate modification of interventions, as required, as a result of the evaluation findings 4.3. Make recommendations regarding future interventions as a result of the evaluation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to:

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REQUIRED SKILLS AND KNOWLEDGE

- identify areas for improvement with OHS incidents
- analyse relevant workplace information and data, and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
- contribute to the assessment of resources needed to systematically manage OHS and, where appropriate, access resources
- contribute to the strategic OHS performance of the organisation

- attention to detail when making observations and recording outcomes
- numeracy skills to carry out simple arithmetical calculations (e.g. % change) and to produce graphs of workplace information and data, to identify trends and recognise limitations of information and data, and effectively use anthropometric tables
- research skills to access relevant OHS information and data to interpret information and data, to identify areas for improvement
- communication skills to:
  - conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  - write policies and procedures, plans
  - use language and literacy skills appropriate to the workgroup and the task
- consultation and negotiation skills to develop plans, and to implement and monitor designated actions
- project management skills to achieve continuous improvement and change
- organisational skills to manage own tasks within a timeframe
- information technology skills to access and enter internal and external information and data on OHS and to use a range of media

Required knowledge

- basic human cognitive and perceptual capabilities relevant to the design of human-machine interfaces
- basics of anthropometry and biomechanics
- characteristics, mode of action and units of measurement of major hazard types
- difference between hazard and risk
- direct and indirect influences that impact on OHS and the environment in the design of product/s
- ethics related to professional practice
- formal and informal communication and consultation processes, and key personnel related to communication
- hierarchy of control and considerations for choosing between different control measures, such as possible inadequacies of particular control measures
- how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:
  - communication skills

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REQUIRED SKILLS AND KNOWLEDGE

- cultural background/workplace diversity
- gender
- labour market changes
- language, literacy and numeracy
- structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location
- workers with specific needs

- human error and implications for design of equipment, work practices and controlling ergonomic hazards
- interdependent relationships between ergonomics and workplace stressors such as psychosocial factors, occupational violence, shift work, repetitive work, awkward postures, lighting, thermal environment and work layout
- internal and external sources of OHS information and data
- key personnel, including identifying 'change agents', within workplace management structure
- language, literacy and cultural profile of the workgroup
- legislative requirements for OHS information and data, and consultation
- limitations of generic hazard and risk checklists, and risk ranking processes
- nature of workplace processes (including work flow, planning and control) and hazards relevant to the particular workplace
- organisational behaviour and culture as it impacts on OHS and on change
- organisational culture as it impacts on the workgroup
- organisational OHS policies and procedures
- other functional areas that impact on the management of OHS
- pertinent sections of relevant Australian and other standards such as AS/NZS 4360: 2004 Risk management, National Standard for the Storage and Handling Workplace Dangerous Goods [NOHSC: 1015(2001)] and National Standard for Manual Handling [NOHSC: 1001 (1990)]
- physiology and functional anatomy relevant to identifying and controlling ergonomic hazards
- principles and practices of a systematic approach to managing OHS
- principles of duty of care including concepts of causation, foreseeability, preventability
- principles of human behaviour and response to interactions with human, physical and task environment to identify psychosocial hazards
- requirements under hazard-specific OHS legislation and codes of practice
- risk as a measure of uncertainty and the factors that affect risk
- risk factors for manual handling injury and risk assessment techniques for manual handling
- roles and responsibilities under OHS legislation of employees including supervisors, contractors, OHS inspectors
- standard industry controls for a range of hazards

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REQUIRED SKILLS AND KNOWLEDGE
• strategies for minimising risk through application of ergonomic design and engineering, work layout, work processes, work organisation • types of hazard identification tools including job system analysis (JSA)

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • application of ergonomic interventions to control OHS risk in work design processes and the work environment generally in an actual workplace or simulation exercise • products developed for application of knowledge and skill in ergonomic interventions • how these products were developed • use of these products • knowledge of the interdependent relationships between ergonomics and workplace stressors.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace • reports from other parties consulted in developing ergonomic interventions • access to relevant legislation, standards, guidelines, information and data.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations

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EVIDENCE GUIDE	
	• oral or written questioning to assess knowledge of physiology and functional anatomy relevant to identifying and controlling ergonomic hazards • review of recommendations made to optimise the integration of controls and display the decision making processes within the work system • written examples of reports on ergonomic risks control programs • assessment of reports about the outcomes of ergonomic assessments and interventions • evaluation of recommendations made regarding future interventions.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other OHS units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Specialists advisors may include:	• designers • engineers (such as design, acoustic, safety, mechanical, civil) • health professionals • legal practitioners • manufacturers and suppliers • occupational hygienists • specialist ergonomists.
Stakeholders may include:	• employees • health and safety, and other employee representatives • managers • OHS committees

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RANGE STATEMENT	
	• supervisors.

Sources of information and data may include:	• external sources such as:
	  • Australian Safety and Compensation Council
	  • employer groups, unions and industry bodies
	  • international and Australian Standards
	  • National Plant and Certification Standards and associated guidance material
	  • OHS professionals, including those involved in safety engineering, occupational hygiene, occupational health, injury management, toxicology, ergonomics and epidemiology
	  • professional associations such as Ergonomics Society of Australia, Safety Institute of Australia, Institute of Engineers Australia, Design Institute of Australia and Building Design Professionals
	  • relevant state/territory and commonwealth OHS legislation and codes of practice
	  • state and territory OHS regulatory bodies
	• internal sources such as:
	  • audits, questionnaires and surveys
	  • documents describing how tasks, projects. inspections, jobs and processes are undertaken
	  • employees
	  • enforcement notices and actions
	  • hazard, incident and investigation reports
	  • job and task statements
	  • manufacturers' manuals and specifications
	  • minutes of meetings
	  • purchasing, contract and tendering procedures
	  • reports
	  • workplace inspections.

Ergonomics interventions may include:	• design of equipment • design of products • design of tools • design of work systems, processes or

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RANGE STATEMENT	
	organisation including work flow, planning and control • design of workplaces • development of new decision making processes • job design • new forms and organisations of work.
Tools and databases may include:	• Australian and international anthropometric databases • Australian and international standards • engineering models.
Legislation, ***codes of practice and standards*** may include:	• Australian and international standards • common law • contract law • criminal law • current Commonwealth and relevant state/territory OHS legislation, regulations, codes of practice, associated standards and guidance material • equal employment opportunity and anti-discrimination law • industrial relations law • privacy legislation • trade practices • workers compensation.
Key personnel may include:	• managers involved in OHS decision making or who may be impacted by decisions.
Other functional areas and management systems may include:	• engineering and maintenance • environmental management • finance and auditing • human resources, industrial relations and personnel management including payroll • information and records management • logistics • purchasing, procurement and contracting • quality management • strategic planning.
Resources may include:	• equipment • financial requirements • personnel, including time allocation • specialised resources such as electronic

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RANGE STATEMENT	
	management systems, communications media and information/data technology equipment.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS605B Apply occupational hygiene principles to control OHS risk

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to apply occupational hygiene knowledge and the techniques to control occupational health and safety (OHS) risk arising from health hazards at work. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit provides for the application of occupational hygiene knowledge, skills and techniques to identify and assess the real or potential occurrence of chemical, physical or biological agents and other workplace stressors (including their interactions) that may affect the health or wellbeing of workers or others, and the recommendations for controls of such hazards. Other useful skills that support this unit are addressed in BSBOHS406B Use equipment to conduct workplace monitoring. The underpinning knowledge and skills required for this unit are outlined in BSBOHS504B Apply principles of OHS risk management and BSBOHS505C Manage hazards in the work environment, and include knowledge of systematic approaches to managing OHS.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify health hazards that may result from features of the workplace or working environment	1.1. Identify ***workplace factors*** that may affect the health of workers 1.2. Identify health ***hazards*** that may result from work processes, work operations, equipment and work procedures 1.3. Identify possible routes of entry to the body and consequent effects on the body for different workplace factors 1.4. Identify situations where ***OHS specialists and other advisors*** may be required

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ELEMENT	PERFORMANCE CRITERIA
2. Analyse the risks of worker exposure to potentially harmful agents and factors	2.1. Determine ***sources of exposure*** and ***related factors*** to potentially harmful agents and factors in work processes and methods 2.2. Identify equipment, sampling plan and techniques for assessing the exposure to selected agents and factors within a workplace 2.3. Interpret and evaluate monitoring and sampling results to provide an assessment of exposure 2.4. Utilise ***exposure standards*** in the assessment of risks 2.5. Report workplace measurements, interpretations and recommendations to stakeholders in a suitable format for the target group
3. Design risk control strategies and advise on implementation	3.1. Apply the ***hierarchy of control*** to design risk control strategies, noting that ***personal protective equipment*** (PPE) is regarded as the least satisfactory control measure 3.2. Identify inadequacies in existing control measures and provide remedial advice 3.3. Develop, select and implement risk control measures when undertaking effective consultation and collaboration with organisation, affected employees and others 3.4. Access ***external sources of information and data***, and specialist advisors as required, on nature of health hazard, level of risk, and risk control options
4. Monitor and evaluate control strategies to minimise workplace exposures	4.1. Monitor and regularly evaluate quality and outcomes of interventions in consultation with stakeholders and relevant employees 4.2. Facilitate modifications to interventions including consultations, as required, as a result of findings of regular evaluation and monitoring 4.3. Identify and document ***training needs***, and arrange training in consultation with workplace stakeholders if required 4.4. Make recommendations regarding future interventions as a result of evaluation and monitoring

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Required Skills and Knowledge

Required skills

- analytical skills to:
  - identify areas for improvement with OHS incidents
  - analyse relevant workplace information and data, and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
  - contribute to the assessment of resources needed to systematically manage OHS and, where appropriate, access resources
  - contribute to the strategic OHS performance of the organisation
- attention to detail when making observations and recording outcomes
- numeracy skills to:
  - carry out simple arithmetical calculations (e.g. % change) and to produce graphs of workplace information and data, to identify trends and recognise limitations of information and data
  - interpret results from workplace measurements
  - use electronic information and data systems to enter workplace information and data, and to produce effective graphical representations
  - use measuring equipment including reading scales and dials applicable to selected hazards
- research skills to access relevant OHS information and data to interpret information and data, to identify areas for improvement
- communication skills to:
  - conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  - write policies, procedures and plans
  - use language and literacy skills appropriate to the workgroup and the task
- consultation and negotiation skills to develop plans, and to implement and monitor designated actions
- project management skills to achieve continuous improvement and change
- organisational skills to manage own tasks within a timeframe
- information technology skills to access and enter internal and external information and data on OHS and to use a range of media

Required knowledge

- characteristics of sound and vibration, units of noise, sound pressure levels, noise dose and process of hearing loss
- characteristics, mode of action and units of measurement of major hazard types
- difference between hazard and risk
- difference between ionising and non-ionising radiation, and the principles of decay and the effect of radiation on the body

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Required skills

- different categories of chemicals such as dangerous goods, hazardous substances, poisons, carcinogens
- direct and indirect influences that impact on OHS and the environment in the design of product/s
- effect of electricity on the body and the difference in action of fuses/circuit breakers and resident current devices
- ethics related to professional practice
- exposure standards, their limitations and their practical use
- formal and informal communication and consultation processes, and key personnel related to communication
- hierarchy of control and considerations for choosing between different control measures, such as possible inadequacies of particular control measures
- how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:
  - labour market changes
  - structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location
  - language, literacy and numeracy
  - communication skills
  - cultural background/workplace diversity
  - gender
  - workers with specific needs
- internal and external sources of OHS information and data
- key personnel, including identifying 'change agents', within workplace management structure
- language, literacy and cultural profile of the work group
- legislative requirements for OHS information and data, and consultation
- limitations of generic hazard and risk checklists, and risk ranking processes
- mathematical knowledge of units of measurement, logarithmic scales, decimals and order of magnitude relevant to making and interpreting measurements
- nature of workplace processes (including work flow, planning and control) and hazards relevant to the particular workplace
- organisational behaviour and culture as it impacts on OHS and on change
- organisational culture as it impacts on the workgroup
- organisational OHS policies and procedures
- other functional areas that impact on the management of OHS
- pertinent sections of relevant Australian and other standards such as AS/NZS 4360: 2004 Risk management, National Standard for the Storage and Handling Workplace Dangerous Goods [NOHSC: 1015(2001)] and National Standard for Manual Handling [NOHSC: 1001 (1990)]
- physiology related to temperature control of the human body, hazards of working

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Required skills
in hot environments and appropriate controls • physiology relevant to understanding mode of action of physical, biological and chemical agents on the body and how they produce harm • principles and practices of a systematic approach to managing OHS • principles of duty of care including concepts of causation, foreseeability, preventability • requirements for control of work permits/written authorities in workplace monitoring activities • requirements for individual fitting, use, maintenance and storage of a range of PPE items • requirements for selection and limitations of use of a range of PPE items • requirements under hazard-specific OHS legislation and codes of practice • risk as a measure of uncertainty and the factors that affect risk • role of control programs for microbiological hazards such as vaccination, local ventilation, decontamination • roles and responsibilities under OHS legislation of employees including supervisors, contractors, OHS inspectors • roles and responsibilities in relation to communication and consultation for OHS committees, OHS representatives, line management, employees and inspectors • sampling methodologies, application and related statistical measures • sources of occupational disease and their prevention • standard industry controls for a range of hazards • toxicology of hazardous materials and potential health effects in the workplace • types of hazard identification tools including job system analysis (JSA) • types of hazardous dusts and fibres, hazardous environments, and the possible ill health outcomes from exposure to dusts, particles • types of measurement and monitoring equipment, including intrinsically safe equipment, calibration requirements and principles of how the equipment takes the measurement and limitations in use

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and	Evidence of the following is essential:

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EVIDENCE GUIDE	
evidence required to demonstrate competency in this unit	• application of hygiene interventions to control OHS risk in work design processes and the work environment • products developed for application of knowledge and skill in hygiene interventions • how these products were developed • use of these products • knowledge of toxicology of hazardous materials and potential health effects in the workplace.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant legislation, standards and guidelines • access to workplace for identification and measurement activities.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • demonstration of techniques used to apply occupational hygiene principles to control OHS risk • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of principles to control OHS risk • review of authenticated documents from the workplace or training environment • evaluation of monitoring and sampling results • assessment of reporting of workplace measurements, interpretations and recommendations to stakeholders • review of documented training needs and training arranged as a result of these needs • evaluation of reports on occupational hygiene programs.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS406C Use equipment to conduct

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EVIDENCE GUIDE	
	workplace monitoring • BSBOHS504B Apply principles of OHS risk management • BSBOHS505C Manage hazards in the work environment.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Workplace factors may include:	• chemical agents such as:
	  • solids
	  • liquids
	  • gases
	  • hazardous or non hazardous substances
	  • toxins
	  • vapours
	  • dusts
	  • mists
	  • fibres
	  • chemical hazards occurring through airborne exposure and through skin contact
	  • other chemical contaminants arising through direct use or as by-product contaminants
	• physical agents such as:
	  • noise
	  • vibration
	  • pressure
	  • light
	  • thermal
	  • ionising and non-ionising radiation
	• biological agents such as:

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RANGE STATEMENT	

	• viruses
	• bacteria
	• zoonoses
	• animals
	• animal products
	• plants and plant products
	• allergens that may induce asthma, dermatitis
	• ergonomic factors such as:
	  • body position in relation to use of equipment or controls/awkward postures
	  • harmful repetitive work
	• psychosocial factors such as:
	  • exposure to harmful/psychological stress at work due to work demand, environment.

Hazards may include:	• source or situation with a potential for harm in terms of human injury or ill health, damage to property or the environment, or a combination of these.
OHS specialists and other advisors may include:	• allied health • engineers (ventilation, mechanical, chemical, electrical) • equipment manufacturers and suppliers • ergonomists • injury management and return to work advisors • internal and external OHS professionals • occupational health advisors • specialist occupational hygienists • substance manufacturers, importers and suppliers • toxicologists.
Sources of exposure may include:	• needle stick exposures • noise etc. produced by plant and machinery • occupationally related contact • substances/products created or generated by work processes, for example fume, carbon monoxide and dust • working with animals and animal products.
Related factors may include:	• dose related impacts • synergistic/potentiation effects (increased

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RANGE STATEMENT	
	effects of multiple exposures) compared with antagonistic effects (lessening effects of two or more substances than the effect of each in isolation).
Exposure standards may include:	• established concentrations of substances that are given as guidance in assessing the risk of exposure • state/territory, national and/or international publications.

Hierarchy of control may include:	• eliminating hazards
	• and where this is not practicable, minimising risk by:
	  • substitution
	  • isolating the hazard from personnel
	  • using engineering controls
	  • using administrative controls (e.g. procedures, training)
	  • using PPE.

Personal protective equipment may include:	• equipment designed to be worn by a person to provide protection from hazards, such as:
	  • clothing and footwear
	  • face and eye protection
	  • hand protection
	  • head protection
	  • hearing protection
	  • respiratory protection.

External sources of information and data may include:	• academic institutions, centres of research and libraries • American Conference of Governmental Industrial Hygienists (ACGIH) • Australian Safety and Compensation Council • Australian Standards, national codes of practice, guidance notes • Commonwealth Scientific and Industrial Research Organisation (CSIRO) • databases such as National Industrial Chemicals Notification and Assessment Scheme (NICNAS) • engineers • external OHS professionals and specialists • manufacturers' manuals and specifications

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RANGE STATEMENT	
	• material safety data sheets (MSDSs) • National Health and Medical Research Council (NHMRC) • OHS professional associations • state and territory OHS regulatory bodies • union and employer associations • Workplace Exposure Standards (WES).
Training needs may include:	• correct selection, use, servicing, storage and disposal of PPE • interpretation of information and data contained in MSDSs, technical documents or brochures about substances, tools, equipment and plant • legislative requirements • maintenance of equipment, tools and plant to ensure effective performance of control systems • methods of minimising exposure • personal hygiene • requirements for health monitoring of use of certain workplace hazardous substances such as lead • risks associated with specific tasks • workplace housekeeping.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

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Co-requisite units

Co-requisite units		

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BSBOHS606B Develop and implement crisis management processes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and implement the planning and management to prevent or mitigate the occupational health and safety (OHS) outcomes of a crisis. The focus is on the development of a number of management processes including emergency assessments, plans and preparation, analysis, monitoring, training and post incident support. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit addresses knowledge, processes and techniques necessary for developing and implementing crisis planning where a 'crisis' is defined as an event with a potentially high consequence outcome in terms of personal injury or damage. Emergency preparedness and management is an important part of crisis management in that it addresses the elements of technical and tactical response. Crisis management involves a number of steps including threat analysis, crisis planning and crisis containment. Useful underpinning knowledge and skills for the OHS practitioner that support this unit are available from BSBOHS404B Contribute to the implementation of strategies to control OHS risk, BSBOHS405B Contribute to the implementation of emergency procedures, and BSBOHS504B Apply principles of OHS risk management.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify sources of risk	1.1. Establish the ***organisational context*** for ***crisis*** management 1.2. Investigate the ***environment*** to identify ***sources of risk***, ***elements at risk*** and ***vulnerability*** 1.3. Identify and consult relevant key personnel, appropriate ***specialist advisors*** and ***emergency response agencies*** in identifying sources of risk

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ELEMENT	PERFORMANCE CRITERIA
	1.4. Develop an ***emergency sources of risk register***
2. Analyse and evaluate sources of risk	2.1. Access ***sources of information and data*** on risk and vulnerability within the context of existing control measures to ***characterise*** the risk 2.2. Identify and consult appropriate specialist advisors and agencies in analysing and evaluating sources of risk 2.3. Evaluate and prioritise risks for action
3. Advise on requirements for crisis management	3.1. Develop and document ***crisis management plan*** 3.2. Identify and document equipment needs 3.3. Identify and document emergency communication requirements and processes for internal and external ***stakeholders*** and ***resources*** 3.4. Identify and document liaison and communication processes with emergency response agencies and other external stakeholders 3.5. Identify and document training needs
4. Monitor and report on the effectiveness of crisis management	4.1. Regularly ***audit and review*** crisis management and develop and implement actions 4.2. Routinely check emergency response equipment for currency and functionality 4.3. Report to management on a regular basis, status of crisis management, including emergency response processes
5. Participate in the emergency control organisation	5.1. Structure the ***emergency control organisation*** so it acts to minimise consequences 5.2. Ensure understanding of and implement own role in, the emergency control organisation during an emergency 5.3. Undertake appropriate liaison with internal personnel and external agencies
6. Advise and support key personnel in the post response/recovery phase to minimise consequences	6.1. Ensure recovery phase procedures focus on minimising consequences to the people involved, the environment and the organisation 6.2. Identify and access ***external support and resource services*** as appropriate to assist recovery phase 6.3. Conduct debriefing, involving key personnel and external agencies as appropriate 6.4. Identify debriefing process areas requiring further attention 6.5. Disseminate appropriate ***reports*** internally and to

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ELEMENT	PERFORMANCE CRITERIA
	relevant external agencies

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - identify areas for improvement with OHS incidents
  - analyse relevant workplace information and data, and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
  - contribute to the assessment of resources needed to systematically manage OHS and, where appropriate, access resources
- numeracy skills to evaluate a range of information and data formats including graphs, maps, matrices, technical reports
- research skills to:
  - access relevant OHS information and data to interpret information and data to identify areas for improvement
  - use information and data gathering techniques such as brainstorming, polling, interviewing
- communication skills to:
  - conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency service personnel

Required knowledge

  - write policies, procedures and plans
  - use language and literacy skills appropriate to the workgroup and the task
  - issue instructions in an authoritative manner during unusual circumstances
- consultation and negotiation skills to develop plans, and to implement and monitor designated actions
- project management skills to achieve continuous improvement and change
- organisational skills to manage own tasks within a timeframe
- information technology skills to access and enter internal and external information and data on OHS and to use a range of media.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development and implementation of crisis management processes, either in an actual workplace or simulation exercise • products developed for implementing crisis management plans • how these products were developed and use of these products • knowledge of emergency-specific requirements under relevant legislation, codes of practice and standards including hazardous substances, dangerous goods and environment protection.
Context of and specific resources for assessment	Assessment must ensure: • access to scenario resources • access to regular training and planning emergency rehearsals • access to office equipment and resources • access to workplace documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • demonstration of techniques used develop and implement crisis management processes • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of principles of effective liaison with emergency services personnel including ensuring that there is no interference or hindrance to their action • review of authenticated documents from the

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EVIDENCE GUIDE	
	workplace or training environment • evaluation and prioritisation of risks for action • review of crisis management plan • assessment of emergency sources of risk register.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS404B Contribute to the implementation of strategies to control OHS risk • BSBOHS405B Contribute to the implementation of emergency procedures • BSBOHS504B Apply principles of OHS risk management • other OHS units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Organisational context may include:	• arrangements or industry/community partnerships • hazards to which the organisation is exposed • legislation under which the organisation operates • operating environment which may be influenced by political, industrial or other internal or external factors
Crisis may include:	• emergencies requiring evacuation • explosion and bomb scares • external emergencies such as flood, storm and traffic accident impacting on organisation • fires and explosions • hazardous substance spills • internal emergencies such as loss of power or

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RANGE STATEMENT	
	water supply • security emergencies such as armed robberies, intruders and disturbed persons • serious injury events

Environment may include:	• conditions or influences that are part of, surround or interact with, the organisation such as:
	  • built environment (buildings and other assets)
	  • physical environment (natural environment including topography, water bodies and vegetation)
	  • social environment (including people interactions, internal and external politics, economic and culture)

Sources of risk may include:	• biological hazards • civil/political hazards including civil/political unrest, terrorism, sabotage and hostage • management activities and controls including deficiencies in areas of non compliance with internal management systems, legislation, and agreements/contracts • natural hazards and/or disasters • technological hazards (failure of technology)
Elements at risk may include:	• assets • commercial reputation and goodwill • environment • people • quality of life
Vulnerability may include:	• degree of susceptibility and resilience of the organisation and the environment to the risk, which is influenced by the characteristics of the organisation in terms of its capacity to anticipate, cope with and recover from the crisis

Specialist advisors may include:	• specialists in emergency management, evacuation, fire, security and safety who use advanced techniques such as:
	  • Hazard and Operability Studies (HazOps)
	  • Management Oversight and Risk Tree (MORT)

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RANGE STATEMENT	
	• computer modelling • scenario analysis
Emergency response agencies may include:	• fire • police • ambulance • State Emergency Services (SES) • government departments • OHS authorities
Emergency sources of risk register may include:	• comprehensive list of events or conditions to be evaluated, their location, together with a range of possible scenarios or circumstances under which a crisis may occur • crisis risk management documentation such as risk assessments
Sources of information and data may include:	• enforcement notices and actions • inspection and incident records • international and national standards, codes of practice and guidelines • material safety data sheets (MSDSs) • organisational records and files • research literature • specialist advisors
Characteristics of the risk may include:	• significant features of the sources of risk such as: • area affected • duration • impact, taking account of the coping capacity of the organisation • intensity • likelihood • perceptions of severity • speed of onset
Crisis management plan may include:	• crisis risk management documentation, such as: • communications strategies • identification of issues • risk assessments/evaluations • risk management team lists • risk registers • treatment strategies

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RANGE STATEMENT	
	• vulnerability profiles • initial response instructions for various roles/areas • policy, emergency response structure • program review and monitoring processes • resource inventory for response and recovery • responsibility and authority of individual roles • training requirements • warning systems
Stakeholders may include:	• external stakeholders such as local community (directly or via the media), representatives of special interest groups, insurance agencies, OHS regulators, local government and other relevant statutory bodies • internal stakeholders such as the board of management, managers, employees (and their families), contractors, visitors and others on site
Resources may include:	• community support agencies • personnel and equipment

Audit and review may include:	• evaluation of ongoing relevance of emergency and crisis plans considering likelihood and consequences of risks
	• analysis of the organisation to respond considering factors such as:
	  • available resources
	  • effectiveness of training, knowledge and skills of key personnel

Emergency control organisation may include:	• structured group within the organisation that includes roles such as emergency controller, communications recorder, media liaison and employee support personnel
External support and resource services may include:	• agencies such as Red Cross, government health departments, State Emergency Service and local government • community liaison and reference groups • counselling services • employer associations • local, non-official sources • unions
Reports may include:	• assumptions

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RANGE STATEMENT	
	• decisions and recommendations for action • evaluation of preparedness • information sources • objectives • previous reports, records and registers • responsibility and resources

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS607B Advise on application of safe design principles to control OHS risk

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to advise on applying safe design principles to control occupational health and safety (OHS) risk during a product's life cycle. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	The central feature of safe design is the application of relevant information and data about human capabilities and behaviour to the design of objects, facilities, procedures and environments that people use. BSBOHS504B Apply principles of OHS risk management, and BSBOHS505C Manage hazards in the work environment, provide underpinning knowledge and skills for this unit. Knowledge of systematic approaches to managing OHS also underpins this unit.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Advise on the OHS requirements of the design process	1.1. Inform ***decision makers*** about their responsibility for the safety of downstream users and beneficiaries 1.2. Advise decision makers of their obligation under law to design and supply a safe designed product by eliminating OHS ***hazards*** and controlling for residual OHS risk 1.3. Promote OHS within the design requirements and include an overall risk evaluation of the designed product's life cycle 1.4. Source and make available to decision makers the most current information of OHS principles, materials, technology and systems for application in the design of the product 1.5. Identify and make available required education and training to enable decision makers to have the necessary skills and knowledge to identify and eliminate OHS hazards, and to control OHS risk in the design phase

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ELEMENT	PERFORMANCE CRITERIA
	1.6. Identify and access relevant ***sources of information and data***, for equipment users in particular 1.7. Consult potential users of the equipment during the design phase 1.8. Identify situations where ***specialist advisors*** may be required
2. Develop a systematic hazard identification and OHS risk evaluation system for safe design	2.1. Identify OHS hazards and conduct a ***risk analysis*** of associated risks across the ***life cycle*** of the designed product 2.2. Guide the selection and implementation of the most appropriate OHS risk controls for the designed product from a systematic analysis of the likelihood and consequences of injury or illness arising from exposure to identified OHS hazards 2.3. Ensure hazard identification and risk analysis includes potential alterations to the designed product during its life 2.4. ***Document decision making*** during the ***OHS risk evaluation*** process and make accessible to all parties 2.5. Establish a residual ***risk register***, recording OHS hazards not eliminated in the design together with possible control strategies, and distribute this information to those involved in the downstream or subsequent life cycle stages 2.6. Monitor the design as it evolves to identify potential new OHS hazards and to manage risks if they become evident
3. Advise on principles of OHS risk control	3.1. Base design to minimise risk on the ***hierarchy of control*** 3.2. Minimise the impact of possible failure or defect, by ensuring the designed product includes fail-to-safe action
4. Advise on consultation processes between people involved in the life cycle of the designed product	4.1. Advise decision makers to consider the needs of the range of people who will use or interact with the designed product 4.2. Arrange consultation between all ***parties*** during the concept and detailed design phases to identify and eliminate OHS hazards and minimise risk 4.3. Appropriately communicate residual OHS risk in the designed product to those who will use or interact with the designed product throughout its life cycle
5. Advise on contractual	5.1. Advise decision makers involved in ***purchasing and***

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ELEMENT	PERFORMANCE CRITERIA
arrangements and procurement systems to minimise 'purchased' OHS risk	***contractual arrangements*** to include a requirement to eliminate OHS hazards, minimise OHS risks, and provide information and data on residual OHS risk 5.2. Include an agreement to carry out a safe design approach in the ***design brief or draft specifications***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to analyse relevant workplace information and data and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
- research skills to:
  - access relevant OHS information and data
  - use information and data gathering techniques such as brainstorming, polling, interviewing
- communication skills to:
  - conduct effective formal and informal meetings and to communicate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  - use language and literacy skills appropriate to the workgroup and the task
  - prepare reports for a range of target groups including OHS committee, OHS representatives, managers, supervisors and other stakeholders
- project management skills to achieve continuous improvement and change
- organisational skills to manage own tasks within a timeframe
- information technology skills to access and enter internal and external information on OHS and to use a range of media
- attention to detail when making observations and recording outcomes

Required knowledge

- basic human cognitive and perceptual capabilities relevant to the design of human-machine interfaces
- basics of anthropometry and biomechanics
- difference between hazard and risk
- direct and indirect influences that impact on OHS and the environment in the design of product/s

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REQUIRED SKILLS AND KNOWLEDGE

• ethics related to professional practice
• formal and informal communication and consultation processes, and key personnel related to communication
• hierarchy of control and considerations for choosing between different control measures, such as possible inadequacies of particular control measures
• human error and implications for design of equipment, work practices and controlling ergonomic hazards
• how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:
  • labour market changes
  • structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location
  • language, literacy and numeracy
  • communication skills
  • cultural background/workplace diversity
  • gender
  • workers with specific needs
• interdependent relationships between ergonomics and workplace stressors such as psychosocial factors, occupational violence, shift work, repetitive work, awkward postures, lighting, thermal environment and work layout
• internal and external sources of OHS information and data
• key personnel, including identifying 'change agents', within workplace management structure
• legislative requirements for OHS information and data, and consultation
• organisational behaviour and culture as it impacts on OHS and on change
• pertinent sections of relevant Australian and other standards such as AS/NZS 4360: 2004 Risk management, National Standard for the Storage and Handling Workplace Dangerous Goods [NOHSC: 1015(2001)] and National Standard for Manual Handling [NOHSC: 1001 (1990)]
• principles and practices of a systematic approach to managing OHS

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • application of OHS risk controls within a collaborative safe design process • products developed for effective application of knowledge and skill in applying OHS risk controls in a safe design process • use of these products • knowledge of professional liability in relation to providing advice.
Context of and specific resources for assessment	Assessment must ensure: • access to reports from other parties consulted in developing appropriate interactions between people involved in the life cycle of the designed product • access to relevant legislation, standards and guidelines, research or industry data • access to workplace documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • demonstration of techniques used to apply principles to control OHS risk • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of direct and indirect influences that impact on OHS and the environment in the design of product/s • review of information made available in relation to OHS principles, materials, technology and systems for application in the design of the product • evaluation of consultation of potential users of the equipment during the design phase • review of residual risk register established • assessment of decision making documented during the OHS risk evaluation process.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is

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EVIDENCE GUIDE	
	recommended, for example: • BSBOHS504B Apply principles of OHS risk management • BSBOHS505C Manage hazards in the work environment.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Decision makers may include:	• any party with influence over the specifications of the designed product including: • designer • client or commissioning agent • financier • manufacturer • supplier • purchaser • installer • user • insurer • importer • erector • maintainer • regulator • employees of these agents.
Hazards may include:	• source or situation with a potential for harm in terms of: • human injury or ill health • damage to property • damage to the environment • a combination of the above.

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RANGE STATEMENT	
Sources of information and data may include:	• Australian and international anthropometric databases • commonwealth, state and territory OHS and other regulatory bodies • employer groups and unions • government and other advisory bodies such as Commonwealth Scientific and Industrial Research Organisation (CSIRO), National Health and Medical Research Council (NHMRC), Australian Consumers Association, Australian Safety and Compensation Council • industry advisory bodies • international and Australian Standards, codes of practice and guidance material • professional associations such as Ergonomics Society of Australia, Engineers Australia, Safety Institute of Australia • research literature.
Specialist advisors may include:	• architects, interior designers and builders • building surveyors and certifiers • design professionals • drafts people, quantity surveyors and surveyors • engineers (such as design, acoustic, safety, mechanical, chemical, civil) • health professionals • insurers • legal practitioners • maintenance and trades personnel • manufacturers • occupational hygienists • specialist ergonomists • suppliers and distributors • technical professionals • workplace trainers and assessors.
Risk analysis may include:	• defining the range of consequences • assessing the effectiveness of existing controls • deciding the likelihood of each consequence • combining these is some way to obtain a level of risk.
Life cycle may include:	• design • construction/manufacture

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RANGE STATEMENT	
	• supply/installation • use • maintenance/servicing • decommissioning/dismantling • disposal.
Documenting decision making may include:	• assumptions • description of consequences and their likelihood • effectiveness of existing controls • factors affecting level of risk • further information and data, and investigation required • groups involved/consulted • information and data used in estimates • methods used • uncertainty in analysis.
OHS risk evaluation involves:	• comparison of risk with pre-established criteria for tolerance (or as low as reasonably achievable) and the subsequent ranking of risks requiring control

Risk register may include:	• list of the risks including:
	  • an indication of the likelihood of the consequence/s occurring
	  • possible consequence/s or outcome/s in terms of injury or damage
	  • scenarios or circumstances under which damage or injury may occur.

Hierarchy of control may include:	• eliminating the hazard • and where this is not practicable, minimising risk by: • substitution • isolating the hazard from personnel • using engineering controls • using administrative controls (e.g. procedures, training) • using personal protective equipment (PPE).
Parties may include:	• builder • commissioning agent • contractors • designer

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RANGE STATEMENT	
	• disposer • importer • installer • maintenance agencies • manufacturer • supplier and/or distributor • user.
Purchasing and contractual arrangements may include:	• purchase order • specifications • statement of work • supplier pre-qualification • tender documentation.
Design brief or draft specifications may include:	• form or outline of document for design brief • instructions • technical requirements or specifications for a designed product, structure, item, system or process.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS608B Conduct an OHS audit

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to conduct an internal or external occupational health and safety (OHS) audit that may or may not be part of certification against a recognised benchmark. It involves systematic examination against audit criteria to determine conformance with planned arrangements and the effectiveness of the organisation's approaches to managing OHS. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit covers the conduct of an OHS audit including developing an audit plan and tools to gather OHS information and data, ensuring client/management liaison and briefing, arranging access to information, setting up entry and exit meetings, and coordinating evaluation/audit and audit team against time lines and the submission of reports. This unit does not cover the evaluation (an integral part of an OHS audit), which is addressed in BSBOHS609B Evaluate an organisation's OHS performance. People having responsibility for an OHS audit will require competence in both units BSBOHS608B Conduct an OHS audit, and BSBOHS609B Evaluate an organisation's OHS performance. This unit applies to the auditing of systematic approaches to managing OHS, which may or may not be formalised as part of an OHS management system, and can apply to

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	internal or external benchmarks. The scope and benchmark criteria for the audit will be agreed before the commencement of OHS information and data gathering and may address all areas of the organisation or an identified function, business or geographical area. An OHS audit may be conducted by an individual or by a team and may be concurrent with other management system audits or conducted as a stand alone exercise.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan an OHS audit	1.1. Define the scope, objectives and ***benchmark*** of the audit 1.2. Identify and obtain ***relevant documentation***, including preliminary material, on the operation of the organisation 1.3. Identify and arrange ***resources*** required to conduct the audit 1.4. Assign timing, schedule and responsibilities for the audit
2. Develop an OHS audit plan	2.1. Ensure nature of ***information and data collected*** provides valid and reliable evidence of the ***systematic approach to managing OHS*** and risk controls within the context of the organisation 2.2. Include in sources of evidence ***key personnel and stakeholders*** 2.3. Ensure information and data collection strategies address issues of security, confidentiality, impartiality and equity 2.4. Include opportunities for corroborating evidence in information and data collection strategies 2.5. Develop and document the ***audit plan*** and submit to client 2.6. Modify the audit plan as a result of client input and preliminary trialling, and to adapt to contingencies as they arise 2.7. Re-submit audit plan to client for comment as appropriate 2.8. Negotiate issues concerning the audit plan with the client and amend documents where required
3. Develop an OHS audit tool	3.1. Ensure ***audit tool/s*** accurately reflect the criteria of the benchmark, nature of risks, identified relevant information and data types 3.2. Ensure audit tools focus on evaluation of performance of the OHS management processes 3.3. Ensure audit tools can be used with consistent outcomes by all members of the audit team 3.4. Enable audit tools to collect evidence in a timely and efficient manner 3.5. Modify audit tools as a result of preliminary trial/s
4. Gather information,	4.1. Consult a broad range of workplace personnel

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ELEMENT	PERFORMANCE CRITERIA
data and OHS records	during evidence gathering activities throughout the audit 4.2. Gather types and sources of evidence, compare this evidence with the audit plan and identify reasons for discrepancies 4.3. Identify and use ***alternative methods*** when evidence is not forthcoming using planned methods 4.4. Check information and data reliability with a number of sources
5. Undertake OHS audit activities	5.1. Undertake ***preliminary evaluation*** 5.2. Undertake initial meetings and worksite familiarisation 5.3. Monitor progress of the audit plan with the client and/or audit team members to ensure resources are being used as planned, and that the audit objectives and audit time lines are being achieved 5.4. Progressively document and retain records of evidence and findings, in an appropriate format 5.5. Report in a prompt manner to the appropriate person/s, including supervisor and/or person in control of the workplace, hazards identified during the audit 5.6. Address own health and safety during the audit in accordance with organisational requirements and standards for safe work practices 5.7. Ensure information and data collection and evaluation activities comply with legal requirements and are carried out ethically 5.8. Undertake exit meetings with key personnel and stakeholders as appropriate
6. Report on the outcomes of the OHS audit	6.1. Present summary audit findings and recommendations to the client at the closing meeting, after consultation with key personnel and stakeholders 6.2. Compare results of the evaluation against the audit criteria 6.3. Present ***objective evidence*** with clear and concise findings, including benefits to be achieved by adoption of the audit report recommendations 6.4. Anticipate possible challenges to the report and prepare further explanations to promote acceptance 6.5. Recommend to the client corrective action and

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ELEMENT	PERFORMANCE CRITERIA
	follow-up processes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• analytical skills to analyse relevant workplace information and data, and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
• research skills to:
  • access relevant OHS information and data
  • use information and data gathering techniques such as brainstorming, polling, interviewing
• communication skills to:
  • relate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  • consult and negotiate to develop plans, and to implement and monitor designated actions
  • use language and literacy skills appropriate to the workgroup and the task
  • write complex documents on policies, procedures and plans
• project management skills to achieve change and to contribute to the assessment of resources needed to systematically manage OHS and, where appropriate, access resources
• organisational skills to manage own tasks within a timeframe
• information technology skills to access and enter internal and external information on OHS
• attention to detail when making observations and recording outcomes.

Required knowledge
• roles and responsibilities under OHS legislation of employees including supervisors, contractors, OHS inspectors etc • legislative requirements for OHS information and data, and consultation • state/territory and commonwealth OHS legislation (acts, regulations, codes of practice, associated standards and guidance material) including prescriptive and performance approaches, and links to other relevant legislation such as industrial relations, equal employment opportunity, workers compensation, rehabilitation • structure and forms of legislation including regulations, codes of practice,

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REQUIRED SKILLS AND KNOWLEDGE

associated standards and guidance material
- difference between common law and statutory law
- concept of common law duty of care
- requirements for record keeping that address OHS, privacy and other relevant legislation
- standards related to OHS information and data, statistics and records management including requirements for information and data under elements of systematically managing OHS
- nature and use of information and data that provides valid and reliable results on performance of OHS management processes (including positive performance indicators [PPIS]) and limitations of other types of measures
- development of tools such as PPIS in assessment of OHS performance
- methods of collecting reliable information and data, commonly encountered problems in collection, and strategies for overcoming such problems
- requirements under hazard-specific OHS legislation and codes of practice
- principles of incident causation and injury processes
- hierarchy of control and considerations for choosing between different control measures, such as possible inadequacies of particular control measures
- standard industry controls for a range of hazards
- limitations of generic hazard and risk checklists and risk ranking processes
- sampling methodologies, application and related statistical measures
- principles and practices of a systematic approach to managing OHS
- requirements of OHS and standards related to systematically managing OHS
- other functional areas that impact on the management of OHS
- internal and external sources of OHS information and data
- how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:
  - labour market changes
  - structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location
  - language, literacy and numeracy
  - communication skills
  - cultural background/workplace diversity
  - gender
  - workers with specific needs
- auditing methods and techniques
- benefits, limitations and use of a range of communication strategies and tools appropriate to the workplace
- organisational behaviour and culture as it impacts on OHS and on change
- ethics related to professional practice
- methods of providing evidence of compliance with OHS legislation

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REQUIRED SKILLS AND KNOWLEDGE
• professional liability in relation to providing advice • principles of effective meetings including agendas, action planning, chair and secretarial duties, minutes and action items • nature of workplace processes (including work flow, planning and control) and hazards relevant to the particular workplace • formal and informal communication and consultation processes, and key personnel related to communication • language, literacy and cultural profile of the workgroup.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • conduct of an internal or external OHS audit. ensuring underpinning knowledge of hazard identification, risk assessment and OHS risk management approaches are reflected in the audit tool/s and the methods used for collecting evidence • products developed for the design and development of audit plans, tools, associated documentation and the systematic examination against defined criteria to determine conformance to planned arrangements • how these products were developed • use of these products • knowledge of auditing methods and techniques.
Context of and specific resources for assessment	Assessment must ensure: • access to organisation documentation, information and data • access to workplace, including personnel involved in areas audited.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

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EVIDENCE GUIDE	
	• analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • demonstration of techniques used in conducting an OHS audit • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of nature of workplace processes (including work flow, planning and control) and hazards relevant to the particular workplace • review of audit plan • evaluation of audit tools developed and appropriateness of modifications • assessment of reporting on hazards identified during the audit • review of audit findings and recommendations.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS609B Evaluate an organisation's OHS performance.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Benchmark may include:	• Australian or international standards • industry standards • standards developed by OHS authorities • standards developed internally by the organisation or by commercial organisations
Relevant documentation may	• codes of practice

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RANGE STATEMENT	
include:	• guidance material • industry standards • OHS legislation • organisational documents
Resources may include:	• equipment • specialist personnel

Information and data collected may include:	• claims
	• legal reports
	• complaints
	• hazard logs
	• incident and injury reports
	• enforcement notices and actions
	• surveillance audits
	• information and data changes since last audit such as new equipment, processes, products, substances or projects
	• interviews with management, supervisors, work groups, employees and other parties across a range of levels and roles including:
	  • health and safety representatives
	  • OHS committee members
	  • design personnel
	  • contractors
	• management system documentation including:
	  • policies and procedures
	  • position descriptions
	  • duty statements
	• observations in the workplace, work operations and records
	• operational documentation including:
	  • completed forms
	  • schedules
	  • checklists
	  • log books
	  • minutes of meetings
	  • action plans
	  • maintenance reports
	  • health surveillance records
	• previous management system reports and

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RANGE STATEMENT	
	industry risk profiles • reports and management reviews • training materials and records

Systematic approach to managing OHS may include:	• comprehensive set of processes that are combined in a methodical and ordered manner to minimise the risk of injury or ill health in the workplace such as:
	  • allocation of resources
	  • review and evaluation for ongoing OHS improvement
	  • communication and consultation
	  • hazard management
	  • processes of OHS planning
	  • record keeping and reporting
	  • training and competency

Key personnel and stakeholders may include:	• management, persons in control of the workplace, supervisors
	• employees and other parties across a range of levels and roles including:
	  • health and safety representatives
	  • OHS committee members
	  • design personnel
	  • where appropriate, contractors
	• customers/clients

Audit plan may include:	• information and data required to be on hand • locations to be inspected • meetings to be scheduled, people to be interviewed • personnel involved • sampling methodology including statistical measures • scope of audit • time lines

Audit tool/s may include:	• instruments for collecting evidence and conducting the analysis and evaluation (they are not the same as the audit criteria or benchmark), which may be:
	  • adapted from existing tools
	  • developed specifically for the purpose
	  • purchased or accessed from existing tools

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RANGE STATEMENT	

	• and may include:
	  • descriptions of required characteristics to be checked
	  • limitations for and instructions for use
	  • performance checklists
	  • sets of questions to be asked

Alternative methods may include:	• alternate sampling methodologies • alternative information and data • discussion groups • how evidence deficiencies will be addressed • interviewing • modified audit checklists • observation • surveys
Preliminary evaluation may include:	• off-site consultations • reviews of relevant organisational documentation, information and data
Objective evidence may include:	• information and data obtained through observation, measurement, tests or other means

Follow-up processes may include:	• agreed meeting date with the client organisation, following sufficient time for implementation of corrective actions, and may include:
	  • checks of the rigour of original audit findings
	  • provision of new non-conformance report/s if required
	  • verification of effectiveness of recommendations and control action/s, particularly in correction of non-compliance

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBOHS609B Evaluate an organisation's OHS performance

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to make judgements as a consequence of an occupational health and safety (OHS) audit and to evaluate an organisation's arrangements for identifying hazards, assessing and controlling risks, and monitoring and improving the effectiveness of the management of OHS and compliance against agreed benchmarks. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit focuses on evaluation of the effectiveness of an organisation's management of OHS. Aspects of the integration with other organisational management systems, the appropriateness of participative arrangements and OHS improvements are some components of the evaluation. The scope may cover OHS performance measures and outcomes, strategies, policies, programs, procedures and the organisation's resources. This unit applies to the auditing of systematic approaches to managing OHS, which may or may not be formalised as part of an OHS management system, and can apply to internal or external benchmarks. The scope and benchmark criteria for the OHS audit will be agreed before the commencement of information and data gathering, and may address all areas of the organisation or an identified function, business or geographical area. Achievement of this competency requires a demonstrated knowledge of the requirements to evaluate the OHS management system (OHSMS) that is in place. An OHSMS is that part of the organisation's overall

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	management system that, for example, covers developing, implementing, reviewing and maintaining the activities for managing OHS risks. Thus, an OHSMS is one systematic approach to managing OHS. This unit is a companion unit to BSBOHS608B Conduct an OHS audit; together the units address the knowledge and skills required to conduct an OHS audit and to evaluate an organisation's OHS performance. People aspiring to skills for overall responsibility of an OHS audit will require competence in both units.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Evaluate effectiveness of systematic approaches to identifying OHS hazards	1.1. Identify workplace ***hazard*** identification activities being undertaken and compare them with organisational policies and procedures 1.2. Examine products, processes and systems to determine whether ***hazards of long latency*** and ***low frequency/high consequence*** are included and minimised 1.3. Examine products, processes and systems to determine whether risks to ***persons other than employees*** are identified and minimised 1.4. Identify ***organisational factors*** that impact on OHS 1.5. Review outcomes of the evidence gathering with ***specialist personnel***, if required
2. Evaluate the effectiveness of systematic approaches to OHS risk management	2.1. Evaluate appropriateness of the organisation's risk assessment tool/s and processes 2.2. Assess outcomes of the risk assessment process for validity, reliability and inclusion of all major OHS risks, in particular demonstrated use of risk assessment methods in the organisation 2.3. Evaluate risk controls for suitability and effectiveness in relation to the organisation's systematic management of OHS
3. Evaluate the effectiveness of systematic OHS monitoring processes	3.1. Evaluate the scope of organisational processes to monitor the implementation and status of systematic approaches to managing OHS 3.2. Evaluate the quality of information and data obtained from the monitoring processes 3.3. Evaluate the managerial level of response to the issues raised in the monitoring process in relation to the level of risk
4. Assess whether the OHS management approaches have produced improved performance	4.1. Evaluate performance indicators, including positive performance indicators (PPIs) to determine whether they provide a true, reliable and timely measure of the effectiveness of the OHS management approaches to reducing OHS risk 4.2. Compare reported performance with evidence gathered and document differences 4.3. Evaluate outcomes of performance and document them in a clear and objective manner
5. Assess and advise on	5.1. Undertake systematic analysis to identify areas of

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ELEMENT	PERFORMANCE CRITERIA
organisational OHS compliance against agreed benchmarks	OHS compliance and non-compliance with ***benchmarks*** 5.2. Provide advice on the impact of legislation and standards on the selection, suitability and implementation of a range of OHS performance interventions 5.3. Document outcomes of evaluation of compliance and report to ***key personnel and stakeholders***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to:
  - use information and relevant workplace information and data, and to make observations of workplace tasks and interactions between people, their activities, equipment, environment and systems
  - interpret information and data, to identify areas for improvement
- research skills to:
  - access relevant OHS information and data
  - use information and data gathering techniques such as brainstorming, polling, interviewing
- communication skills to:
  - relate effectively with personnel at all levels of the organisation, OHS specialists and, as required, emergency services personnel
  - prepare reports for a range of target groups including OHS committee, OHS representatives, managers, supervisors and other stakeholders
  - employ consultation and negotiation skills to develop plans, and to implement and monitor designated actions
  - conduct effective formal and informal meetings
  - use language and literacy skills appropriate to the workgroup and the task
- project management skills to achieve continuous improvement and change, and to contribute to strategic OHS performance of the organisation
- numeracy skills to carry out simple statistical analysis e.g. mean, standard deviation, regression
- organisational skills to manage own tasks within a timeframe
- information technology skills to:

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REQUIRED SKILLS AND KNOWLEDGE

- access internal and external information and data on OHS
- prepare reports and to analyse and evaluate a range of information and data formats including graphs, maps, matrices, technical reports
- use electronic information and data systems to enter workplace information and data and to produce effective graphical representation
- use a range of communication media
- attention to detail when making observations and recording outcomes.

Required knowledge

- roles and responsibilities under OHS legislation of employees including supervisors, contractors, OHS inspectors
- principles of duty of care including concepts of causation, foreseeability, preventability
- legislative requirements for OHS information and data, and consultation
- roles and responsibilities in relation to communication and consultation for OHS committees, OHS representatives, line management, employees and inspectors
- state/territory and commonwealth OHS legislation (acts, regulations, codes of practice, associated standards and guidance material) including prescriptive and performance approaches and links to other relevant legislation such as industrial relations, equal employment opportunity, workers compensation, rehabilitation
- structure and forms of legislation including regulations, codes of practice, associated standards and guidance material
- difference between common law and statutory law
- concept of common law duty of care
- requirements for record keeping that address OHS, privacy and other relevant legislation
- standards related to OHS information and data, statistics and records management including requirements for information and data under elements of systematically managing OHS
- nature and use of information and data that provides valid and reliable results on performance of OHS management processes (including PPIs) and limitations of other types of measures
- development of tools such as PPIs in assessment of OHS performance
- methods of collecting reliable information and data, commonly encountered problems in collection, and strategies for overcoming such problems
- requirements for reporting under OHS and other relevant legislation including notification and reporting of incidents
- difference between hazard and risk
- risk as a measure of uncertainty and the factors that affect risk
- requirements under hazard-specific OHS legislation and codes of practice
- principles of incident causation and injury processes
- characteristics, mode of action and units of measurement of major hazard types

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REQUIRED SKILLS AND KNOWLEDGE

- principles of human behaviour and response to interactions with human, physical and task environment to identify psychosocial hazards
- hierarchy of control and considerations for choosing between different control measures, such as possible inadequacies of particular control measures
- standard industry controls for a range of hazards
- types of hazard identification tools including job system analysis (JSA)
- limitations of generic hazard and risk checklists, and risk ranking processes
- sampling methodologies, application and related statistical measures
- principles and practices of a systematic approach to managing OHS
- range of risk analysis/assessment techniques and tools, and the application and limitations of those techniques and tools
- requirements of OHS and standards related to systematically managing OHS
- other functional areas that impact on the management of OHS
- internal and external sources of OHS information and data
- how the characteristics and composition of the workforce impact on risk and the systematic approach to managing OHS, for example:
  - labour market changes
  - structure and organisation of workforce e.g. part-time, casual and contract workers, shift rosters, geographical location
  - language, literacy and numeracy
  - communication skills
  - cultural background/workplace diversity
  - gender
  - workers with specific needs
- auditing methods and techniques
- benefits, limitations and use of a range of communication strategies and tools appropriate to the workplace
- organisational behaviour and culture as it impacts on OHS and on change
- ethics related to professional practice
- methods of providing evidence of compliance with OHS legislation
- professional liability in relation to providing advice
- principles of effective meetings including agendas, action planning, chair and secretarial duties, minutes and action items
- organisational OHS policies and procedures
- nature of workplace processes (including work flow, planning and control) and hazards relevant to the particular workplace
- formal and informal communication and consultation processes, and key personnel related to communication
- language, literacy and cultural profile of the workgroup
- organisational culture as it impacts on the workgroup.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • application of OHS risk control within a collaborative environment • products developed for effective application of knowledge and skill in applying OHS risk controls • how these products were developed • use of these products • knowledge of nature and use of information and data that provides valid and reliable results on performance of OHS management processes (including PPIs) and limitations of other types of measures.
Context of and specific resources for assessment	Assessment must ensure: • access to organisation documentation, information and data • access to workplace, including personnel involved in areas be evaluated.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party reports of on-the-job performance by the candidate • demonstration of techniques used in reviewing the organisation's OHS performance • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of roles and responsibilities under OHS legislation of employees including supervisors, contractors, OHS inspectors • evaluation of the organisation's risk assessment tool/s

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EVIDENCE GUIDE	
	and processes • evaluation and documentation of performance outcomes • review of report developed to document outcomes of evaluation of compliance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBOHS608B Conduct an OHS audit.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Hazards may include:	• source or situation with a potential for harm in terms of: • human injury or ill health • damage to property • damage to the environment • or a combination of these
Hazards of long latency may include:	• conditions, illnesses and other health risks that result from longer term exposure to specific triggers such as: • chemicals • noise • radiation • psychosocial factors
Hazards of low frequency/high consequence may include:	• high impact events that may result in very serious injury, death or multiple death situations that occur rarely such as: • explosions • fires

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RANGE STATEMENT	
	• building collapses
Persons other than employees may include:	• contractors • customers/clients • neighbourhood or local community members • visitors to premises

Organisational factors may include:	• authority
	• geographical spread of sites
	• nature of hazards and level of risk
	• other management systems requiring interface or integration with management of OHS
	• participatory arrangements
	• reporting structure
	• roster and shift arrangements
	• supervision structure
	• workplace culture including industrial relations and safety culture
	• workforce structure such as:
	  • labour hire
	  • contractors
	  • part-time and casual workers
	  • cultural diversity

Specialist personnel may include:	• external consultants specialising in specific areas of OHS such as:
	  • safety engineering
	  • ergonomics
	  • hygiene
	  • toxicology
	  • psychology
	  • occupational health
	• specialist staff within government agencies offering assistance in specialist or problem areas within OHS

Benchmarks may include:	• industry specific standards • OHS management system standards • organisation's business plan • specific legislation
Key personnel and stakeholders may include:	• boards of management and shareholders • customers/clients • employees and other parties across a range of

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RANGE STATEMENT	
	levels and roles including health and safety representatives and OHS committee members • management, persons in control of the workplace, supervisors

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Occupational Health and Safety

Co-requisite units

Co-requisite units		

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BSBPMG401A Apply project scope management techniques

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to contribute to the control of a project's scope by assisting with the identification of objectives, deliverables, constraints, assumptions and outcomes; and by applying controls once the project has commenced. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to a project team member working under the direction of a project manager with other project team members. The individual may be operating within an organisation or as a consultant. The skills should be applied in the context of multiple complex projects, with the individual operating as part of a specialist project management team. In the context of this unit a complex project is defined as a project which involves: • a comprehensive and multi faceted project plan • a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a worker managing a straightforward project or a section of a larger project where project management is not the main focus of the job

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	role are covered by BSBPMG510A Manage projects. The functions performed by a project manager to manage the scope of the whole project are addressed in BSBPMG502A Manage project scope.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Contribute to scope definition	1.1. Contribute to the identification of ***project deliverables***

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ELEMENT	PERFORMANCE CRITERIA
	1.2. Contribute to the identification of measurable outcomes to enable evaluation of project performance 1.3. Contribute to the development of the ***scope management plan***
2. Apply project scope controls	2.1. Undertake work in accordance with agreed project management plan and by using established ***change control procedures*** and ***performance measurement procedures*** 2.2. Monitor and control aspects of project scope and communicate instances of non-compliance with overall scope to the project manager and other team members 2.3. Measure progress to determine potential, perceived and actual scope changes 2.4. Appropriately report scope changes 2.5. Provide assistance in the review of project outcomes to determine the effectiveness of initial and subsequent scope management approaches

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills sufficient to interpret potentially complex project plans and documentation
- planning and organisational skills to monitor and respond to compliance issues and to measure progress against agreed objectives
- teamwork and communication skills to liaise with other members of the project team on a range of project scope management issues and challenges.

Required knowledge

- elements which make up a project scope management plan
- methods for measuring work outcomes and progress against plans
- factors likely to impact on project scope
- methods for segmenting and documenting the work of a project.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • knowledge of project scope management methodologies • participation in the definition and management of scope in relation to multiple complex projects.
Context of and specific resources for assessment	Assessment must ensure: • access to project documentation which includes information about project scope and project team involvement.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses addressing different project scope management scenarios • oral or written questioning to assess knowledge of strategies for managing project scope and their application to different situations • assessment of contribution to the development of the scope management plan • evaluation of progress measured to determine potential, perceived and actual scope changes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Project Management.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Project deliverables may include:	• products, outputs and services defined within the project scope
Scope management plan may include:	• constraints, assumptions and exclusions • deliverables, activities and tasks • project benefits and outcomes • project objectives • work organisation and/or product breakdown structures
Change control procedures may include:	• adjusting designated project documentation, for example plans, schedules, directives, guidelines and instructions which include change instructions, change request procedures and nominated change authorities • identifying designated elements of the project liable to change, for example finance and duration of tasks
Performance measurement procedures may include:	• using tools and techniques to manage and measure project progress in terms of time and resources

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

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Co-requisite units

Co-requisite units		

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BSBPMG402A Apply time management techniques

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assist with project scheduling activities, the application and monitoring of the agreed schedule and evaluation of time management effectiveness for the project. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to a project team member working under the direction of a project manager with other project team members. The individual may be operating within an organisation or as a consultant. The skills should be applied in the context of multiple complex projects, with the individual operating as part of a specialist project management team. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a worker managing a straightforward project or a section of a larger project

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	where project management is not the main focus of the job role are covered by BSBPMG510A Manage projects.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Assist in the development of project schedules	1.1. Contribute, within ***delegated authority***, to determining the duration and effort, sequence and dependencies of tasks to meet project objectives 1.2. Use ***project scheduling tools and techniques*** to help establish and integrate planned time management

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ELEMENT	PERFORMANCE CRITERIA
	aspects of the schedule, resource allocation and financial requirements 1.3. Contribute to the agreement process and communication of the schedule to the client and other stakeholders
2. Apply agreed schedules	2.1. Use techniques to measure, record and report progress of activities in relation to agreed schedules and plans 2.2. Record variance between actual and planned ***progress*** and report to ***others*** for remedial action 2.3. Contribute to forecasting the impact of changes on the schedule and to the analysis of options 2.4. Implement agreed changes to the schedule and update plans as directed to accommodate changing situations throughout the project
3. Participate in assessing time management outcomes	3.1. Provide assistance in the ***review of project outcomes*** to determine the effectiveness of time management tools, techniques and approaches used 3.2. Report scheduling and time management issues and responses to project manager for application in future projects

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to work with project tools and techniques and to write reports on time management issues • organisational skills to sequence tasks and to monitor progress against agreed objectives • technology skills to use software (if appropriate).
Required knowledge
• project management methodology in relation to time management • implications of time management for project resourcing • project management techniques and tools for creating and monitoring schedules.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • application of time management techniques in relation to multiple complex projects • knowledge of tools and techniques for monitoring project schedules.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation such as diaries, progress reports, spreadsheets, and other planning tools with timeframes linked to outcomes.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job project time management performance by the candidate • analysis of responses to case studies and scenarios addressing project time management issues and problems • oral or written questioning to assess knowledge of strategies, tools and techniques for managing project time and their particular application/s • review of techniques used to measure, record and report progress of activities in relation to agreed schedules and plans • assessment of changes implemented to the schedule and the updating of plans to accommodate changing situations throughout the project.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Project

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EVIDENCE GUIDE	
	Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Delegated authority means:	• in a multi-disciplinary environment subject to frequent change • under limited guidance and supervision • within agreed authorisation and limits • within established organisational framework, procedures and routines
Project scheduling tools and techniques may include:	• assisting in qualitative and/or quantitative time analysis, such as schedule simulation, work breakdown structure, decision analysis, contingency planning and alternative strategy development • using personal experience and/or experts • using specialist time analysis tools to provide output to assist in the decision making process
Progress may refer to:	• diaries, incident logs, occurrence reports and other similar documentation • lists of potential schedule events • project and/or organisation files and records
Others may include:	• relevant authority • project manager • project specialists or other personnel • team members
Review of project outcomes may include:	• achievement of agreed major milestones, for example phases and sub-contracts • change of key personnel • delivery of major deliverables • finalisation of project and other agreed milestones

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG403A Apply cost management techniques

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to work with others to produce a project budget, to monitor project expenditure and to contribute to cost finalisation processes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to a project team member working under the direction of a project manager with other project team members. The individual may be operating within an organisation or as a consultant. The skills should be applied in the context of multiple complex projects, with the individual operating as part of a specialist project management team. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a worker managing a straightforward project or a section of a larger project where project management is not the main focus of the job

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	role are covered by BSBPMG510A Manage projects.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Assist with the development of the project budget	1.1. Determine ***estimated costs*** for tasks and activities and communicate these costs to ***others*** for inclusion in project budget 1.2. Map costs against duration/effort and resources allocated, and communicate to project manager for inclusion in the project plan, budget and expenditure

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ELEMENT	PERFORMANCE CRITERIA
	flow 1.3. Contribute to the development of ***cost management strategies and processes***, and financial authorisation within ***delegated authority***
2. Monitor project costs	2.1. Monitor income and expenditure against the agreed project plan and budgets to facilitate cost management throughout the project life cycle 2.2. Use established cost management methods, techniques and tools to identify and report variations in the budget to higher project authority for action 2.3. Implement and monitor agreed actions and report progress to others to ensure cost objectives are achieved throughout the project life cycle
3. Contribute to cost finalisation process	3.1. Provide assistance in the finalisation and transfer of financial assets, liabilities and records to the client or relevant operational support agency 3.2. Provide assistance in the review of project outcomes by use of ***project records***, to determine the effectiveness of initial and subsequent cost management strategies and processes 3.3. Report cost management issues and responses to project/program manager for application in future projects

Required Skills and Knowledge

Required skills
• numeracy skills to check and interpret project budgets • financial management skills to develop project budgets, monitor costs and report on cost management • technology skills to use financial management software to develop and monitor project budgets.
Required knowledge
• budgeting processes and their relationship to the project life cycle • cost management tools and techniques.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • application of cost management techniques in relation to budgets for multiple complex projects • knowledge of cost management tools and techniques.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of project management budgets and related financial documentation • access to evidence or project records of team member involvement in financial management processes.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following assessment methods are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses addressing different project cost management scenarios • oral or written questioning to assess knowledge of strategies for managing project costs • analysis of budgets and costing prepared by the candidate • review of communication to others of estimated costs for tasks and activities for inclusion in project budget • evaluation of reporting on cost management issues and responses to project/program manager.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Project Management.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Estimated costs may refer to:	• application and registration fees for intellectual property (IP) and patents etc. • contingency (as outcome of risk assessment) • facilities • labour • material • project management overheads • travel and subsistence
Others may include:	• higher project authority • project manager • project specialists or other personnel • team members
Cost management strategies and processes may include:	• communication with stakeholders, dispute resolution and modification procedures • implementation of financial control mechanisms • measurement of actual progress against planned milestones • recording and reporting of variations
Delegated authority means:	• conducted under limited guidance and supervision • subject to frequent change in a multi-disciplinary environment • within agreed authorisation and limits • within established organisational framework, procedures and routines
Project records may include:	• cost management lessons learned • cost verification and validation documentation • input to cost management plans • invoice and payment records • lists of potential costs • project and/or organisation files and records • reports to relevant stakeholders

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG404A Apply quality management techniques

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to enhance project outcomes through contributing to quality planning, applying quality policies and procedures and contributing to continuous improvement within projects. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to a project team member working under the direction of a project manager with other project team members. The individual may be operating within an organisation or as a consultant. The skills should be applied in the context of multiple complex projects, with the individual operating as part of a specialist project management team. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a worker managing a straightforward project or a section of a larger project

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	where project management is not the main focus of the job role are covered by BSBPMG510A Manage projects.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Contribute to quality planning	1.1. Contribute to determining quality requirements of project stakeholders 1.2. Contribute to establishing quantifiable quality criteria for project outcomes and objectives

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ELEMENT	PERFORMANCE CRITERIA
	1.3. Source ***information*** to locate and interpret quality policy and procedures 1.4. Contribute to the development of quality requirements in the project plan and processes
2. Apply quality policies and procedures	2.1. Undertake work under ***delegated authority*** to implement ***quality assurance*** within the project in accordance with agreed quality standards and guidelines 2.2. Maintain records and documentation in accordance with set procedures to facilitate ***quality control*** and to provide an audit trail 2.3. Document and evaluate results of project activities and product performance to determine compliance with agreed quality standards 2.4. Report shortfalls in quality outcomes to ***others*** to enable appropriate action to be initiated
3. Contribute to continuous improvement process	3.1. Participate in the ongoing review of project outcomes to determine the effectiveness of quality management activities 3.2. Report quality management issues and responses to others for application in future projects

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to work with quality documents and project records, and to produce records for quality control and auditing purposes • organisational skills and attention to detail to monitor compliance with agreed standards • teamwork and communication skills to communicate quality issues.
Required knowledge
• quality auditing processes and requirements • quality standards and their place in the project life cycle.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • application of quality management and continuous improvement techniques in relation to multiple complex projects • knowledge of quality auditing processes and requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of project management documentation used for quality control purposes • access to project team records.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following assessment methods are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of strategies for managing project quality and their application to different situations • analysis of responses to case studies and scenarios which present issues and problems in project quality management • review of records documented and maintained • evaluation of documented results of project activities and product performance • evaluation of reports developed about shortfalls in quality outcomes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Project Management.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information may include:	• designated standard operating procedures and regulations • organisation and project standards • organisational quality management policy and guidelines as applied to specific requirements of a project • project quality guidelines and instructions
Delegated authority means:	• carried out under limited guidance and supervision • subject to frequent change in a multi-disciplinary environment • within agreed authorisation and limits • within established organisational framework, procedures and routines
Quality assurance may include:	• project finalisation process to capture lessons learned and to enable continuous improvement • systematic review of the project management process to ensure compliance with organisational policy and guidelines
Quality control may include:	• inspections and audits in compliance with guidelines • monitoring conformance with the specification • recommending ways to eliminate causes of unsatisfactory performance of products or processes • regular inspection by the individual or the monitoring of inspections by internal or external agents • reporting of variances
Others may include:	• higher project authority • project manager • project specialists or other personnel • team members

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG405A Apply human resources management approaches

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assist with aspects of human resources management of a project. This involves establishing human resource requirements, identifying the learning and development needs of people working on the project, facilitating these needs being met and resolving conflict within the team. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to a project team member working under the direction of a project manager with other project team members. The individual may be operating within an organisation or as a consultant. The skills should be applied in the context of multiple complex projects, with the individual operating as part of a specialist project management team. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Assist with determining human resource requirements	1.1. Analyse ***work breakdown structure*** to determine human resource requirements 1.2. Assess skill levels of project personnel against project task requirements 1.3. Assign responsibilities for achieving project deliverables
2. Assist with human resource monitoring and stakeholder	2.1. Monitor the work of project personnel against assigned roles and responsibilities 2.2. Track, monitor and control actual effort against plan,

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ELEMENT	PERFORMANCE CRITERIA
liaison	review skill levels against allocated tasks and recommend remedial action, where required, to ***others*** 2.3. Contribute to tracking, monitoring and controlling stakeholder participation and communication with the project 2.4. Advise others when assigned responsibilities are not met by project personnel, or stakeholder expectations are at variance 2.5. Undertake work in a multi-disciplinary environment in accordance with established human resource management ***practices***, ***plans***, ***guidelines and procedures*** to achieve designated project objectives 2.6. Resolve potential and actual conflicts in accordance with agreed dispute resolution processes or report to others for resolution 2.7. Offer ***human resource development opportunities*** to individuals with skill gaps
3. Contribute to evaluating human resource and stakeholder management practices	3.1. Contribute to assessing the overall effectiveness of project human resource management and document lessons learned 3.2. Report human resource issues to others to aid the continuous improvement process 3.3. Contribute to stakeholder satisfaction analysis and assist with post-project operational review

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to read and interpret project plans and schedules • planning and monitoring skills to track performance in relation to assigned tasks • teamwork and communication skills to resolve conflict, advise others of performance issues and deal with stakeholders.
Required knowledge
• job design principles and work breakdown structures

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REQUIRED SKILLS AND KNOWLEDGE
• learning and development options • project roles, responsibilities and reporting requirements in relation to human resources.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • use of work breakdown structures in human resource project planning • use of effective methods for monitoring roles and responsibilities in multiple complex projects • knowledge of methods for providing feedback on performance and for improving performance of project team members.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of project management documentation for human resource management.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following assessment methods are appropriate for this unit: • analysis of responses to case studies and scenarios which reflect human resource issues and problems in a project management context • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses addressing different project human resource management scenarios • oral or written questioning to assess knowledge of strategies for managing project human resources and their application to different situations • analysis of responsibilities assigned for achieving

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EVIDENCE GUIDE	
	project deliverables • review of documentation about lessons learned • evaluation of reports developed about human resource issues.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Work breakdown structure is:	• a planning tool or process which divides and sub-divides the work of a project into smaller, more manageable work packages
Others may include:	• project manager • project specialists or other personnel • relevant project authority • team members
Practices, ***plans guidelines and procedures*** may include:	• industrial relations agreements and guidelines • organisation project management procedures • professional operating standards • project human resources management plan • skills framework nominating skill levels required for specific types of project activities • staffing plan/job description
Human resource development opportunities may include:	• action learning sets • coaching and mentoring • performance feedback • team building and group activities • training

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG406A Apply communications management techniques

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide a critical link between people, ideas and information at all stages in the project lifecycle. It covers assisting the project team to plan communications, communicating information related to the project and reviewing communications. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to a project team member working under the direction of a project manager with other project team members. The individual may be operating within an organisation or as a consultant. The skills should be applied in the context of multiple complex projects, with the individual operating as part of a specialist project management team. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a worker managing a

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	straightforward project or a section of a larger project where project management is not the main focus of the job role are covered by BSBPMG510A Manage projects. The functions performed by a project manager to manage project communications for the whole project are addressed in BSBPMG507A Manage project communications.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**

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ELEMENT	PERFORMANCE CRITERIA
1. Contribute to communications planning	1.1. Identify, source and contribute relevant information requirements to initial project documentation 1.2. Contribute to developing and implementing the communications plan and communications networks
2. Conduct information management activities	2.1. Gather, validate, store, retrieve, filter and disseminate information within agreed procedures as directed, to aid decision making processes throughout project life cycle 2.2. Maintain information to ensure data is secure and auditable
3. Communicate project information	3.1. Undertake ***communication within project***, ***with client and other stakeholders*** within agreed networks, processes and procedures to ensure flow of necessary information 3.2. Ensure reports are written and released in accordance with authorisation, or drafted for release by ***others*** 3.3. Seek information and advice from appropriate project authorities when in doubt
4. Contribute to assessment of communication effectiveness	4.1. Provide assistance in the ongoing review of project outcomes to determine the effectiveness of communications management activities 4.2. Report communication management issues and responses to higher project authorities for application in future projects

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• writing skills to generate reports and project communications for stakeholders • teamwork and communication skills to acquire and disseminate relevant project information • organisational skills to sort and prioritise information and ideas • technological skills to manage information storage and retrieval.
Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE
• models and methods of communications management in the context of the project life cycle and other project management functions • communications theory.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • contribution to the development and implementation of communications plans in relation to multiple complex projects • knowledge of communications theory.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of project management documentation for communications management purposes • access to records of project team involvement in communications activities.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following assessment methods are appropriate for this unit: • written reports/examples of project communications • observation of performance in role plays which demonstrate techniques in communicating important project information • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses addressing different project scenarios which present issues and problems in project communication management • oral or written questioning to assess knowledge of strategies for managing project communications

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EVIDENCE GUIDE	
	• review of communication management issues and responses reported to higher project authorities.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Communication within project*, *with client and other stakeholders:	• will be:
	  • in a multi-disciplinary environment subject to frequent change
	  • under limited guidance and supervision
	  • within agreed authorisation and limits
	  • within established organisational framework, procedures and routines
	• and may include:
	  • written reports, briefs, minutes, letters and other documentation
	  • oral briefings, advice, conversations and telephone calls
	  • computer generated communications, for example electronic data transfer and internet

Others may include:	• higher project authorities • project manager • project specialists or personnel • team members

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG407A Apply risk management techniques

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to assist with aspects of risk management within a project. It specifically involves assisting the project team to plan for, control and review risks associated with the project. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to a project team member working under the direction of a project manager with other project team members. The individual may be operating within an organisation or as a consultant. The skills should be applied in the context of multiple complex projects, with the individual operating as part of a specialist project management team. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a worker managing a straightforward project or a section of a larger project

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	where project management is not the main focus of the job role are covered by BSBPMG510A Manage projects.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Assist with risk analysis and planning	1.1. Contribute to identifying and prioritising potential risks throughout the project life cycle 1.2. Provide input, within ***delegated authority***, to develop risk management strategies and risk

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ELEMENT	PERFORMANCE CRITERIA
	management plans within established guidelines 1.3. Establish ***risk analysis methods***, ***techniques and tools*** to assist in the analysis of risks 1.4. Ensure reporting mechanisms for risks are planned for and agreed to
2. Conduct risk control activities	2.1. Undertake control activities in accordance with agreed project and risk management plans to achieve project objectives 2.2. Measure progress and act on perceived, potential or actual risks within authority or report to ***others*** for response 2.3. Contribute to the implementation of agreed risk approaches and the amendment of plans to reflect the changing environment 2.4. Identify and report ***opportunities*** for action in the same way as risks
3. Contribute to assessing risk management outcomes	3.1. Contribute to the ongoing ***review*** of project outcomes to determine the effectiveness of risk management activities by accessing project ***records*** and other available information 3.2. Report risk management issues and responses to others for lessons learned or application in future projects

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• planning, organising and analytical skills to assist with risk analysis, risk management planning and review of risk management outcomes • communication and teamwork skills to contribute to collective processes for risk management • initiative and enterprise to think laterally about risks and how they might occur.
Required knowledge
• risk management framework and risk management processes.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • application of risk management techniques in relation to multiple complex projects • knowledge of risk management methods, techniques and tools.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of project management documentation for risk management.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following assessment methods are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses addressing case studies and scenarios which present issues and problems in project risk management • oral or written questioning to assess knowledge of strategies for managing project risk and their application to different situations • review of risk analysis methods, techniques and tools • review of risk management plans • evaluation of reporting of risk management issues and responses.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Project Management.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Delegated authority means:	• subject to frequent change in a multi-disciplinary environment • under limited guidance and supervision • within agreed authorisation and limits • within established organisational framework, procedures and routines
Risk analysis methods, ***techniques and tools*** may include:	• using personal experience and/or subject matter experts • assisting in qualitative and/or quantitative risk analysis, such as schedule simulation, decision analysis, contingency planning and alternative strategy development • using specialist risk analysis tool/s to assist in the decision making process
Others may include:	• higher project authorities • project manager • project specialists or personnel • team members
Opportunities may include:	• better means of achieving a result • changes in the project or broader environment that offer scope for rescheduling activities to better effect • efficiencies or methods to work more effectively, such as ways of shortening an activity • initial project activities that reveal entirely different sets of priorities for example, product development, research and policy development • responses to changing commercial/competitive conditions
Reviews may include evaluations of:	• agreed major milestones, for example phases and sub-contracts • change of key personnel • delivery of major deliverables

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RANGE STATEMENT	
	• finalisation of project and other agreed milestones
Records may include:	• lists of potential risk events (risk register/log) • project and/or organisation files and records • risk analysis and reappraisal • risk diaries, incident logs, occurrence reports and other such documentation • risk management lessons learned • risk management plan

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG408A Apply contract and procurement procedures

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. • Inclusion of 'audit of environmentally sustainable supply practices' in the Range Statement

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to assist with contracting and procurement for a project. It covers identifying procurement and contract requirements, assisting with contractor selection, conducting contracting and procurement activities and assisting with finalisation of activities for the project.

Application of the Unit

This unit applies to a project team member working under the direction of a project manager with other project team members. The individual may be operating within an organisation or as a consultant. The skills should be applied in the context of multiple complex projects, with the individual operating as part of a specialist project management team.

In the context of this unit a complex project is defined as a project which involves:

- the need for a comprehensive and multi faceted project plan
- the need for a formal internal or external communications strategy
- a dedicated and diverse project budget
- multiple administrative components
- multiple operational components
- a wide range of stakeholders
- a project operations team.

The functions performed by a worker managing a straightforward project or a section of a larger project where project management is not the main focus of the job role are covered by BSBPMG510A Manage projects.

The functions performed by a project manager to manage procurement for the whole project are addressed in BSBPMG509A Manage project procurement.

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Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Assist with contract and procurement planning	1.1. Contribute to the establishment of procurement requirements 1.2. Act under ***delegated authority*** to contribute to the development of the procurement management plan 1.3. Contribute to the development of project documentation for contract definition and formation
2. Contribute to contractor selection process	2.1. Gather and evaluate information on potential suppliers 2.2. Make recommendations to assist in selection of preferred contractors 2.3. Provide contribution to the definition of agreed terms and conditions with preferred contractor/s 2.4. Assist with the development of the final tendering and contractual documentation
3. Conduct contracting and procurement	3.1. Undertake ***procurement activities*** and maintain information so that reporting, confidentiality and

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ELEMENT	PERFORMANCE CRITERIA
activities	audit requirements are met 3.2. Receive, reconcile and register supplies in accordance with established procedures to facilitate payment throughout project 3.3. Monitor and control contractors and suppliers and their activities for compliance with designated responsibilities, deliverables, time/cost and quality conformance and other requirements
4. Conduct finalisation activities	4.1. Test and accept supplies to ensure quality and suitability for purpose 4.2. Provide assistance in the ongoing ***review*** of project outcomes using available ***records*** and information to determine the effectiveness of contracting and procurement activities 4.3. Report contracting and procurement management issues and responses to ***others*** for application in future projects

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills
• organisational skills to participate in contract and procurement management • literacy skills to read and interpret contracts and procurement documentation • interpersonal skills to communicate effectively with contractors and suppliers about contract performance and obligations.
Required knowledge
• contract and procurement management framework as applied to project management • project procurement and contract management tools and techniques • broad legal contractual obligations of each party.

Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • application of procurement and contract management techniques in relation to multiple complex projects • knowledge of the place and role of procurement in the project life cycle.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of project contract and procurement documentation • access to records of project team participation in procurement tasks and activities.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following assessment methods are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses addressing different case studies and scenarios which present issues and problems in procurement • oral or written questioning to assess knowledge of strategies for project procurement and contracting and their application to different situations • review of procurement and contract management plans and other documentation associated with procurement processes • evaluation of information gathered on potential suppliers • assessment of recommendations made to assist in selecting preferred contractors • assessment of reports produced about contracting and procurement management issues.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Project Management.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Delegated authority means:	• subject to frequent change in a multi-disciplinary environment • under limited guidance and supervision • within agreed authorisation and limits • within established organisational framework, procedures and routines
Procurement activities may include:	• conducting transfer and disposal actions • confirming details and obtaining additional information about quotes etc. • formally receipting goods and services or providing formal notice of delivery of goods and services • identifying occupational health and safety (OHS) issues • liaising with client, contractors, sub-contractors and other stakeholders • maintaining registers and lists • obtaining approvals from higher project authorities • obtaining quotes from potential suppliers, providing quotes to potential clients or collaborating agencies and alliances • planning, specifying and/or conducting test and acceptance procedures • audit of environmentally sustainable supply practices • processing payment documentation
Reviews may include evaluations of:	• agreed major milestones, for example phases and sub-contracts • changes of key personnel • delivery of major deliverables • finalisation of project and other agreed milestones
Records may include:	• assets and disposal actions • lists of suppliers • procurement logs, registers

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	• procurement reports • records of contract planning, formation, negotiation or administration • quotes, invoices and receipts • test and acceptance results
Others may include:	• higher project authorities • project manager • project specialists or personnel • team members

Unit Sector(s)

Management and Leadership - Project Management

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BSBPMG501A Manage application of project integrative processes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to integrate and balance the overall project management functions of scope, time, cost, quality, human resources, communications, risk and procurement; and to align and track the project objectives to comply with organisational goals, strategies and objectives. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to an individual who is clearly and solely responsible for the management and leadership of a complex project, either as an employee of an organisation or as an external consultant. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a program manager to manage the integration of all functions of project management in a program or multiple project are addressed in BSBPMG601A Direct the integration of projects.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Manage integration of all functions of project management	1.1. Identify project stakeholders and their interests, with guidance of higher project authority 1.2. Analyse all ***project management functions*** with higher project authority and relevant stakeholders to determine achievable project objectives 1.3. Develop a ***project plan*** to integrate all project management functions to achieve outcomes and

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ELEMENT	PERFORMANCE CRITERIA
	requirements for time, cost, quality and risk 1.4. Obtain endorsement of project plan by higher project authority 1.5. Establish designated mechanisms to control planned activity
2. Coordinate internal and external environments	2.1. Manage the project within an established ***internal working environment*** to ensure work is conducted effectively throughout the project 2.2. Maintain established links to align project objectives with organisation objectives throughout the project life cycle 2.3. Seek assistance, where necessary, from higher project authority to resolve conflicts which may negatively affect project objectives
3. Implement project activities throughout life cycle	3.1. Ensure agreed project phases, approval points and review points occur 3.2. Report progress against established project baselines to measure performance throughout the project life cycle 3.3. Implement established ***finalisation plans***, ***procedures and activities*** 3.4. Identify and document ***integration management issues and recommended improvements***, and pass on to higher project authority for application to future projects

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to write project plans, progress reports and project communications • teamwork and communication skills to lead the project team and deal with stakeholders • time management skills to ensure priorities are addressed • planning and organising skills to manage the integration of project activities
Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE
• project life cycle • role and responsibilities of the project manager • project planning tools and techniques.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of project plans for multiple complex projects • details of how plans were monitored and outcomes were reported • knowledge of project life cycle.
Context of and specific resources for assessment	Assessment must ensure: • access to project documentation relevant to project integration • access to feedback from project stakeholders.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of strategies for managing project integration and their application to different situations • analysis of responses addressing case studies and scenarios which present project integration management issues and problems • assessment of project reports and examples of project plans.
Guidance information for	Holistic assessment with other units relevant to the

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EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
The nine ***project management functions*** are:	• communications • cost • human resources • procurement and contracting • project integration • quality • risk • scope • time
Project plan may include:	• covering document which integrates the requirements of the nine functions of project management using appropriate formats and procedures • single document • multiple documents
Internal working environment may include:	• arrangement of project personnel and equipment • identity and differentiation of the project within the larger environment • personal working conditions • physical location of project • team dynamics
Finalisation plans, procedures and activities may include:	• final audit/reconciliation • finalisation of account codes and other financial documentation

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RANGE STATEMENT	
	• forwarding finalisation report to senior personnel • project evaluation • settling of financial liabilities • transferring of assets to client or originating owner • transition of responsibility/ownership of project deliverables/products • warranty requirements
Integration management issues and recommended improvements may include:	• evaluation using established success and failure criteria • knowledge management • lessons learned • records • training programs

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG502A Manage project scope

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to determine and manage project outcomes. It covers project authorisation, developing a scope management plan, and managing the application of project scope controls. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to an individual who is clearly and solely responsible for the management and leadership of a complex project, either as an employee of an organisation or as an external consultant. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a program manager to manage project scope within multiple projects are addressed in BSBPMG602A Direct the scope of a project program.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Conduct project authorisation activities	1.1. Develop and confirm procedures for ***project authorisation*** with an ***appropriate authority*** as the basis for future project management activity and the commitment of resources and effort 1.2. Obtain authorisation to expend resources
2. Conduct project scope definition activities	2.1. Identify project objectives, ***deliverables***, constraints, exclusions, assumptions and principal work activities 2.2. Establish measurable project benefits and outcomes to enable evaluation of project performance

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Establish agreement to a shared understanding of desired project outcomes with ***relevant stakeholders*** 2.4. Develop and implement scope management plan
3. Manage application of scope controls	3.1. Implement agreed ***scope management*** procedures and processes 3.2. Manage the impact of scope changes within established time, cost and quality constraints according to ***change control procedures*** and to meet project objectives 3.3. Review progress and record results to assess the effectiveness of scope management procedures 3.4. Identify and document scope management issues and recommended improvements, and pass on to higher authority for application to future projects

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills sufficient to interpret and analyse complex project plans and documentation • planning and organising skills to monitor scope and to respond to potential and actual changes • problem-solving and analytical skills to address project scope management issues and challenges • negotiation skills to address changes to scope with a range of stakeholders.
Required knowledge
• role and responsibilities of the project manager in relation to project planning • project life cycle and the significance of scope management • problem areas likely to be encountered in scope management • project management tools used for managing scope.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of scope management for multiple complex projects • knowledge of scope management plans, tools, issues and likely challenges.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation used to document and manage project scope • consideration of feedback from project stakeholders regarding the management of project scope.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of strategies for managing project scope and their application to different situations • analysis of responses in addressing case studies and scenarios which present project scope management issues and problems • observation of demonstrated techniques in negotiating changes to scope • review of scope management plan • assessment of documentation about scope management issues and recommended improvements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Project Management.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Project authorisation may:	• already have been decided before involvement of the project manager • be in the form of a scope statement which briefly explains why the project has been formed, what it hopes to achieve and how success will be measured • be required at a number of critical review points during the project
Appropriate authority may include:	• client, owner, sponsor, senior executive or other individual or group vested with the authority to make decisions regarding the project
Project ***deliverables*** may include:	• all products and services defined within the project scope
Relevant stakeholders may include:	• team members • clients • sponsors • internal and external parties • decision makers
Scope management may include:	• determining that a scope change has occurred or is about to occur • identifying and reporting scope creep, that is, incremental increases to scope that were not part of the original project requirements • identifying factors which influence changes to scope • implementing agreed scope changes • monitoring and reporting the effect of scope changes on other areas and on achievement of project objectives • refining scope progressively throughout the project life cycle • seeking authorisation for changes to project scope

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RANGE STATEMENT	
Change control procedures may include:	• formal agreements, for example contracts, sub-contracts, memoranda of understanding • major elements of the project liable to change, for example design, engineering, finance • project documentation, including plans, schedules, statements, directives, guidelines and instructions

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG503A Manage project time

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage time within projects. It covers determining and implementing the project schedule, and assessing time management outcomes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to an individual who is clearly and solely responsible for the management and leadership of a complex project, either as an employee of an organisation or as an external consultant. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a program manager to manage time within multiple projects are addressed in BSBPMG603A Direct time management of a project program.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Determine project schedule	1.1. Determine the duration, effort, sequence and dependencies of tasks from the scope definition as the basis for the project schedule 1.2. Obtain input and approval for the project schedule from stakeholders 1.3. Select and use ***methods***, ***techniques and tools***, within delegated authority, to determine preferred schedule, ***time management plan*/*s***, resource allocation and financial requirements 1.4. Obtain agreement to the schedule from relevant

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ELEMENT	PERFORMANCE CRITERIA
	project authority and communicate this agreement to stakeholders to provide the basis for measurement of progress
2. Implement project schedule	2.1. Implement mechanisms to measure, record and report progress of activities in relation to the agreed schedule and plans 2.2. Conduct ongoing analysis of options to identify variances and to forecast the impact of changes to the schedule 2.3. Review progress throughout the project life cycle and implement agreed schedule changes to ensure consistency with changing scope, objectives and constraints related to time and resource availability 2.4. Develop responses to perceived, potential or actual schedule changes, ensure agreement by a higher project authority, and implement to maintain project objectives
3. Assess time management outcomes	3.1. Review project outcomes from available ***records*** and information to determine the effectiveness of time management activities 3.2. Identify and document time management issues and recommended improvements, and pass on to relevant project authority for application in future projects

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to read, develop and interpret project schedules • self management skills to ensure vision and priorities are clear • organisational skills to sequence tasks and see that objectives are met • communication skills to convey expectations and to advise others of progress • technology skills to use appropriate software to develop project schedules • analytical skills to review and evaluate process.
Required knowledge
• techniques and tools for project schedules

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REQUIRED SKILLS AND KNOWLEDGE
• project life cycle • time management methodologies, their capabilities, limitations, application and outcomes.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated successful application of time management tools and techniques to ensure objectives are met on multiple complex projects • knowledge of time management methodologies, their capabilities, limitations, application and outcomes.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation, schedules, reports from project team • consideration of feedback from project stakeholders regarding the management of project time.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of strategies for managing project time and their application to different situations. • analysis of responses in addressing case studies and scenarios which present project time management issues and problems • review of progress throughout project life cycle; and review of implementation of agreed schedule changes • assessment of documented time management issues

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EVIDENCE GUIDE	
	and recommended improvements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Methods, ***techniques and tools*** may include:	• conducting or supervising qualitative and/or quantitative time analysis, such as schedule simulation, decision analysis, contingency planning and alternative strategy development • using personal experience and/or subject matter experts • using specialist time analysis tools to assist in the decision making process
Time management plan*/*s may include:	• lists of milestones • project schedule and sub-schedules • schedule management strategies and actions, standardised formal arrangements, responsibility assignment, contingency plans and assigned schedule management responsibilities
Records may include:	• diaries, incident logs, occurrence reports and other such records • gantt, PERT and other scheduling charts • lists of variances and forecasts of potential schedule events • project and/or organisation files and records • records of analysis, evaluation of options, recommended and approved courses of action

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG504A Manage project costs

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify, analyse and refine project costs to produce a budget, and to use this budget as the principal mechanism to control project cost. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to an individual who is clearly and solely responsible for the management and leadership of a complex project, either as an employee of an organisation or an external consultant. In the context of this unit a complex project is defined as a project which involves: the need for a comprehensive and multi-faceted project plan the need for a formal internal or external communications strategy a dedicated and diverse project budget multiple administrative components multiple operational components a wide range of stakeholders a project operations team. The functions performed by a program manager to manage costs within multiple projects are addressed in BSBPMG604A Direct cost management of a project program.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Determine project costs	1.1. Determine resource requirements for individual tasks, with input from stakeholders and guidance of ***others***
	1.2. Estimate ***project costs*** to enable budgets to be developed and implement agreed cost management processes
	1.3. Develop and implement a cost management plan, within ***delegated authority***, to ensure clarity of understanding and ongoing management of project

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ELEMENT	PERFORMANCE CRITERIA
	finances
2. Monitor and control project costs	2.1. Implement agreed ***financial management processes and procedures*** to monitor actual expenditure and to control costs 2.2. Select and use cost analysis methods and tools to identify cost variations, evaluate options and recommend actions to a higher project authority 2.3. Implement, monitor and modify agreed actions to maintain financial and overall project objectives throughout the project lifecycle
3. Conduct financial completion activities	3.1. Conduct appropriate activities to signify financial completion 3.2. ***Review*** project outcomes using available ***records*** and information to determine the effectiveness of cost management processes and procedures 3.3. Review cost management issues and identify improvements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• numeracy and budgeting skills to monitor expenditure and manage costs • technology skills to use software for recording expenditure and reporting on finances • analytical skills to evaluate processes and recommend improvements.
Required knowledge
• budgeting processes, tools and techniques • methods and tools for costing and cost analysis.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated evidence of monitoring project costs across the project life cycle for multiple complex projects • knowledge of budgeting processes, tools and techniques.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation including budgets, financial documents • consideration of feedback from project stakeholders on how costs were managed.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of strategies for managing project costs and their application to different situations. • analysis of responses addressing case studies and scenarios which present project cost management issues and problems • review of developed and implemented cost management plan • review of documentation about project outcomes, cost management issues and identified improvements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Project Management.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Others may include:	• relevant project authority • program manager • project specialists or other personnel • team members
Project costs are estimated to a level of accuracy available considering:	• availability of information at the time • contingencies to allow for identified risks and uncertainty • organisational requirements, for example overhead and profit margin • stage of the project life cycle
Delegated authority means that activities will:	• be conducted routinely or as changing circumstances dictate • be done independently within broad guidance or by taking the lead of a team • involve consultation with other project members, teams and internal stakeholders • involve the selection, use and supervision of appropriate time management methods, tools and techniques • take into account internal organisational change and external environmental change
Financial management processes and procedures may include:	• approval processes • communication and reporting processes • financial authorisations/delegations • invoice procedures
Reviewing may include evaluations of:	• agreed major milestones, for example phases and sub-contracts • change of key personnel • delivery of major deliverables • finalisation of project and other agreed milestones
Records may include:	• budgets, commitment and expenditure • cost management lessons learned

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RANGE STATEMENT	
	• cost management plans • invoice and payment summaries • lists of potential costs • project and/or organisation files and records • recommended and approved courses of action • reports to relevant stakeholders

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG505A Manage project quality

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage quality within projects. It covers determining quality requirements, implementing quality assurance processes, and using review and evaluation to make quality improvements in current and future projects. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to an individual who is clearly and solely responsible for the management and leadership of a complex project, either as an employee of an organisation or an external consultant. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a program manager to manage quality within multiple projects are addressed in BSBPMG605A Direct quality management of a project program.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Determine quality requirements	1.1. Determine ***quality objectives***, standards and levels, with input from stakeholders and guidance of a higher project authority, to establish the basis for quality outcomes and ***a quality management plan*** 1.2. Select and use established ***quality management methods***, ***techniques and tools*** to determine preferred mix of quality, capability, cost and time 1.3. Identify quality criteria, obtain agreement from a higher project authority and communicate to stakeholders, to ensure clarity of understanding and

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ELEMENT	PERFORMANCE CRITERIA
	achievement of quality and overall project objectives 1.4. Include agreed quality requirements in the project plan and implement as basis for performance measurement
2. Implement quality assurance processes	2.1. Measure and document results of project activities and product performance throughout the project life cycle to determine compliance with agreed quality standards 2.2. Identify causes of unsatisfactory results, in consultation with client, and recommend appropriate actions to a higher project authority to enable continuous improvement in quality outcomes 2.3. Conduct inspections of quality processes and ***quality control*** results to determine compliance of quality standards to overall quality objectives 2.4. Maintain a quality management system to enable effective recording and communication of quality issues and outcomes to a higher project authority and stakeholders
3. Implement project quality improvements	3.1. Review processes and implement agreed changes continually throughout the project life cycle to ensure continuous quality improvement 3.2. Review project outcomes against performance criteria to determine the effectiveness of quality management processes and procedures 3.3. Identify and document lessons learned and recommended ***improvements***, and pass on to higher project authority for application in future projects

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to develop quality objectives and criteria • communication and leadership skills to motivate staff, convey expectations and ensure outcomes are met • analytical skills to monitor achievement of project outcomes against quality criteria

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REQUIRED SKILLS AND KNOWLEDGE
• coaching and mentoring skills to boost performance.
Required knowledge

• quality management theory, techniques, tools and methodologies
• roles and responsibilities in project management
• methods for managing and improving performance
• relevant legislation codes and national standards:
  • award and enterprise agreements and industrial instruments
  • industry codes of practice
  • legislation from all levels of government that affects business operation, especially in regard to occupational health and safety and environmental issues, equal opportunity, industrial relations and anti-discrimination.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated evidence of successfully managing project staff so that quality outcomes were achieved on multiple complex projects • knowledge of a range of quality management tools, techniques and methodologies.
Context of and specific resources for assessment	Assessment must ensure: • access to project documentation which includes quality criteria and evidence of quality monitoring and improvement practices • consideration of feedback from project stakeholders regarding project quality management.
Method of assessment	This unit applies to an individual who is clearly and solely responsible for the management and leadership of a complex project, either as an employee of an organisation or an external consultant. • direct questioning combined with review of

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EVIDENCE GUIDE	
	portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of strategies for managing project quality and their application to different situations • analysis of candidate responses in addressing case studies and scenarios which present project quality management issues and problems • review of project plan quality requirements • review of implementation of agreed changes • evaluation of review of project outcomes against performance criteria.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Quality objectives may include:	• negotiated trade-offs between cost, schedule and performance • requirements from a higher project authority • requirements from the client and other stakeholders • those quality aspects which may impact on customer satisfaction
Quality management plan may include:	• authorisations and responsibilities for quality control • continuous improvement • established processes • quality assurance

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RANGE STATEMENT	
Quality management methods*, *techniques and tools may include:	• benchmarking • brainstorming • charting processes • control charts • defining control • flowcharts • group work activities • histograms • pareto charts • processes that limit and/or indicate variation • ranking candidates • run charts • scattergrams • undertaking benefit/cost analysis
Quality control may include:	• monitoring conformance with specifications • monitoring of regular inspections by internal or external agents • recommending ways to eliminate causes of unsatisfactory performance of products or processes
Improvements may include:	• formal practices, such as total quality management or continuous improvement • improvement by less formal processes that enhance both the product quality and processes of the project, for example client surveys to determine client satisfaction with project team performance

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

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Co-requisite units

Co-requisite units		

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BSBPMG506A Manage project human resources

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake human resource management (HRM) within projects. It involves planning for human resources, implementing staff training and development, and managing the project team and stakeholders. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to an individual who is clearly and solely responsible for the management and leadership of a complex project, either as an employee of an organisation or an external consultant. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a program manager to manage human resources within multiple projects are addressed in BSBPMG606A Direct human resources management of a project program.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Implement human resource and stakeholder planning activities	1.1. Identify project stakeholders and verify their expectations in order to quantify project outcomes 1.2. Determine resource requirements for individual tasks, with input from stakeholders and guidance from a higher project authority, to determine project staffing levels and required competencies 1.3. Establish ***project organisation and structure*** to align individual and group competencies with project tasks 1.4. Allocate ***staff*** to the project with the approval of a higher project authority, to meet work requirements

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ELEMENT	PERFORMANCE CRITERIA
	throughout the project life cycle 1.5. Develop and use ***HRM methods***, ***techniques and tools*** to implement procedures and plans to ensure clarity of understanding and ongoing HRM
2. Implement staff training and development	2.1. Communicate designated staff responsibilities, authority and individual performance measurement criteria to the project team and other relevant stakeholders, to ensure clarity of understanding of the work and to provide a basis for ongoing assessment 2.2. Identify, plan and implement ongoing development and training of project team members to achieve HRM and overall project objectives, with agreement of a higher project authority 2.3. Measure individuals' performance against agreed criteria and initiate actions to overcome shortfalls in performance and to encourage career progression
3. Manage the project team and stakeholders	3.1. Implement processes to promote continuous improvement of staff, and take actions to improve staff and overall project effectiveness 3.2. Monitor and report internal and external influences on individual and project team member performance and morale to a higher project authority, if necessary, for remedial action 3.3. Implement established procedures for interpersonal communication, counselling and conflict resolution to maintain a positive working environment 3.4. Continually review stakeholder expectations to resolve expectation variance and to ensure project is on track to deliver expected outcomes 3.5. Identify and manage inter-project and intra-project conflict to minimise impact on achievement of project objectives 3.6. Identify and document human resource and stakeholder management issues, and recommended improvements, and pass on to higher project authority for application in future projects

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills
• planning skills to identify skills required and to allocate project responsibilities to staff • communication and leadership skills to motivate staff, convey expectations and ensure outcomes are met • interpersonal skills to resolve conflict • coaching and mentoring skills to boost performance • analytical skills to review project and to identify improvements.
Required knowledge
• roles and responsibilities in project management • methods for managing and improving performance • HRM legislation, methods, techniques and tools.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated evidence of successfully managing project staff so that outcomes were achieved on multiple complex projects • knowledge of HRM legislation, methods, techniques and tools.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation • consideration of feedback from project team and other stakeholders on how human resources were managed.

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of strategies for managing project human resources and their application to different situations • analysis of responses addressing case studies and scenarios which present project human resource management issues and problems • assessment of staff allocated to the project • evaluation of processes used to measure individuals' performance against agreed criteria and to overcome shortfalls in performance • evaluation of how procedures for interpersonal communication, counselling and conflict resolution were implemented.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Project organisation and structure may be affected by established organisational responses to external influences such as:	• accepted work practices • relevant legislation, such as anti-discrimination, equal employment opportunity, affirmative action and occupational health and safety • workplace bargaining

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RANGE STATEMENT	
Staff may be:	• external to the organisation, such as consultants, auditors and quality assurance specialists • from within the organisation, such as staff on loan from other projects
HRM methods, ***techniques and tools*** may include established organisational responses to:	• conflict resolution • HRM forecasts, staffing plans and job descriptions • individual and group competency identification and development • performance monitoring, assessment and reporting • staff recruitment and reallocation

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG507A Manage project communications

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to link people, ideas and information at all stages in the project life cycle. Project communications management ensures the timely and appropriate generation, collection, dissemination, storage and disposal of project information through formal structures and processes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to an individual who is clearly and solely responsible for the management and leadership of a complex project, either as an employee of an organisation or an external consultant. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a program manager to manage communications within multiple projects are addressed in BSBPMG607A Direct communications management of a project program.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Plan communications processes	1.1. Identify, document and analyse information requirements, with input from stakeholders and guidance from a higher project authority, as the basis for communications planning 1.2. Develop, within ***delegated authority***, an agreed communications management plan to ensure clarity of understanding and achievement of project objectives throughout the project life cycle 1.3. Establish and maintain designated ***project***

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ELEMENT	PERFORMANCE CRITERIA
	management information system (***PMIS***) to ensure the quality, validity, timeliness and integrity of information and communication
2. Manage project information	2.1. Manage the generation, gathering, storage, retrieval, analysis and dissemination of information by project staff and stakeholders within established systems and procedures to aid decision making processes throughout the project life cycle 2.2. Implement, modify, monitor and control designated information validation processes to optimise quality and accuracy of data 2.3. Implement and maintain agreed ***communication networks*** between project staff, client and other stakeholders to ensure effective communications at appropriate levels throughout the project life cycle 2.4. Identify communication and information management system problems and report them to a higher project authority
3. Assess communications management outcomes	3.1. Conduct finalisation activities to ensure agreed ownership of, and responsibility for, information collected 3.2. Review project outcomes to determine the effectiveness of management information and communications processes and procedures 3.3. Identify and document lessons learned and recommended improvements, and pass on to higher project authority for application in future projects

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to write reports and communicate key issues • technology skills to facilitate effective communication • organisational skills to manage information • analytical skills to review project outcomes.
Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE
• project life cycle and the place of communications within it • project management information systems and their various applications.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development and implementation of a range of project communications that facilitate effective outcomes for multiple complex projects • knowledge of the place of communications within the project life cycle.
Context of and specific resources for assessment	Assessment must ensure: • access to project communication documentation • consideration of feedback from project team members and other stakeholders as to how effectively communication was managed.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of strategies for managing project communications and their application to different situations • analysis of responses in addressing case studies and scenarios which present project communication management issues and problems • observation of performance in role plays which demonstrate communication skills • evaluation of communications management plan • review of identification and reporting of

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EVIDENCE GUIDE	
	communication and information management system problems.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Delegated authority means that activities may:	• be conducted routinely or as changing circumstances dictate • be done independently within broad guidance or by taking the lead of a team • involve consultation with other project members, teams and internal stakeholders • involve the selection, use and supervision of appropriate communications management methods and tools • take into account internal organisational change and external environmental change
Project management information system is a means for communicating knowledge about the project and provides a systematic approach to the storing, searching and retrieval of information relevant to the project and may include:	• complex computer-based systems • modified systems to cater for unique project requirements • simple manual systems
Communication networks may include:	• client organisation and end users • formal networks • informal networks • organisation's communication networks

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RANGE STATEMENT	
	• specific networks

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG508A Manage project risk

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage risk within a project to avoid adverse effects on project outcomes. It covers determining, monitoring and controlling project risks, and assessing risk management outcomes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to an individual who is clearly and solely responsible for the management and leadership of a complex project, either as an employee of an organisation or an external consultant. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a program manager to manage risk within multiple projects are addressed in BSBPMG608A Direct risk management of a project program.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Determine project risks	1.1. Identify, document and analyse ***risks***, in consultation with stakeholders and higher project authority, as the basis for risk planning 1.2. Use established ***risk management techniques and tools***, within ***delegated authority***, to analyse risks, assess options and recommend preferred risk approaches 1.3. Develop risk management plans, secure agreement of stakeholders and communicate plans to ensure clarity of understanding and ongoing management of

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ELEMENT	PERFORMANCE CRITERIA
	risk factors 1.4. Establish designated ***risk management processes and procedures*** to enable effective management and communication of risk events, responses and results
2. Monitor and control project risks	2.1. Manage project in accordance with established project and risk management plans to ensure a common approach to the achievement of objectives 2.2. Monitor progress against project plans to identify variances and ***recommend responses*** to a higher project authority for remedial action 2.3. Implement agreed risk responses and modify plans to reflect changing project objectives in an environment of uncertainty
3. Assess risk management outcomes	3.1. Review project outcomes to determine effectiveness of risk management processes and procedures 3.2. Identify and document risk issues and recommended improvements, and pass on to higher project authority for application in future projects

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to write risk management plans • problem-solving skills to control risks • lateral thinking skills to identify risks • planning and organisational skills to monitor project progress • analytical skills to review project outcomes in terms of risk management.
Required knowledge
• risk management framework • risk management techniques, tools and approaches.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated evidence of effective risk management for multiple complex projects • knowledge of risk management techniques, strategies and tools.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace risk management documentation • consideration of feedback from project stakeholders as to how risks were managed.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of the risk management framework • analysis of responses in addressing case studies and scenarios which present project scope management issues and problems • review of risk management plans • evaluation of monitoring of progress against project plans • assessment of identified and documented risk issues and recommended improvements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units in the Diploma of Project Management.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Risks may be:	• actual • likely/probable • perceived • potential
Risk management techniques and tools may include:	• calling upon personal experience and/or subject matter experts • conducting or supervising qualitative and/or quantitative risk analysis, such as schedule simulation, decision analysis, contingency planning and alternative strategy development • using specialist risk analysis tools to assist in the decision making process
Delegated authority refers to planning and activities that may:	• be conducted routinely or as changing circumstances dictate • be done independently within broad guidance or by taking the lead of a team • involve consultation with other project members, teams and internal stakeholders • involve the selection, use and supervision of appropriate risk management methods, tools and techniques
Risk management processes and procedures may include:	• communication with stakeholders, dispute resolution and modification procedures • implementation of risk control trigger mechanisms • measurement of actual progress against planned milestones • recording and reporting of major variance • setting key milestones at significant points during the project and at completion
Recommended responses to variations may be made:	• in consultation with project team members, section heads, project manager and stakeholders • independently or with higher project authority

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RANGE STATEMENT	
	endorsement if necessary • regularly throughout the project life cycle • taking into account internal organisational change and external environmental change

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG509A Manage project procurement

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake procurement and contract management within projects. It covers determining procurement requirements, establishing agreed procurement processes, conducting contracting and procurement activities, and managing finalisation processes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to an individual who is clearly and solely responsible for the management and leadership of a complex project, either as an employee of an organisation or an external consultant. In the context of this unit a complex project is defined as a project which involves: • the need for a comprehensive and multi faceted project plan • the need for a formal internal or external communications strategy • a dedicated and diverse project budget • multiple administrative components • multiple operational components • a wide range of stakeholders • a project operations team. The functions performed by a program manager to manage procurement within multiple projects are addressed in BSBPMG609A Direct procurement and contracting for a project program.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Determine procurement requirements	1.1. Identify procurement requirements with input from stakeholders as the basis for procurement planning and contracts 1.2. Establish and maintain, within ***delegated authority***, an agreed ***procurement management plan*** and strategies to ensure clarity of understanding between stakeholders and achievement of project objectives
2. Establish agreed	2.1. Obtain information from established sources capable

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ELEMENT	PERFORMANCE CRITERIA
procurement processes	of fulfilling procurement requirements to determine how project objectives can be met 2.2. Adopt established selection processes and selection criteria, including occupational health and safety (OHS) requirements, and communicate to stakeholders and prospective contractors or suppliers to ensure fair competition 2.3. Obtain approvals for procurement processes to be used for the project from higher project authority to enable formal discussions to be conducted
3. Conduct contracting and procurement activities	3.1. Communicate agreed proposals and/or specifications to prospective contractors or suppliers to ensure clarity of understanding of project objectives 3.2. Evaluate responses and select preferred contractors or suppliers in accordance with current legal requirements and agreed selection processes 3.3. Conduct negotiations with preferred contractor or supplier, with guidance of higher project authority if necessary, to agree on contract terms and conditions, establish common goals and minimise uncertainty
4. Implement contract and/or procurement	4.1. Implement established procurement management plan and make ***modifications*** with higher project authority approval, to ensure a common approach to achievement of objectives 4.2. Review progress and manage agreed changes to ensure timely completion of tasks, resolution of conflicts and achievement of project objectives within the legal framework of the contract 4.3. Identify and report procurement management problems to higher project authority and implement agreed remedial actions to ensure project objectives are met
5. Manage contract and procurement finalisation procedures	5.1. Conduct finalisation activities to ensure contract deliverables meet contractual requirements 5.2. Review project outcomes using available ***procurement records and information*** to determine effectiveness of contracting and procurement processes and procedures 5.3. Document lessons learned and recommended improvements, and pass on to higher project authority for application in future projects

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills
• problem-solving skills to resolve contractual and logistic issues • negotiation skills to obtain required agreement in procurement and contracting discussions • planning and organisational skills to identify procurement and contract requirements and to adjust and sequence these appropriately • literacy and numeracy skills to produce and work with a range of procurement and contract documentation • technology skills to use procurement and financial management software.
Required knowledge
• contracts and legal obligations as they relate to project management • procurement options, procedures and documentation • relevant legislation, codes and national standards relevant.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated experience in managing procurement and contracting processes in multiple complex projects • knowledge of contracts and legal obligations as they relate to project management.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation in the area of procurement and contracts • consideration of evidence from stakeholders as to how procurement was managed.

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of strategies for managing project procurement and their application to different situations • analysis of responses in addressing case studies and scenarios which present project procurement and contract management issues and problems • review of procurement management plan • review of communication of agreed proposals and/or specifications to prospective contractors or suppliers • assessment of evaluation of responses and selection processes for preferred contractors or suppliers • review of identification and reporting of procurement management problems.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units in the Diploma of Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Delegated authority refers to planning and activities that may:	• be conducted routinely or as changing circumstances dictate • be done independently within broad guidance or by taking the lead of a team • involve consultation with other project members, teams and internal stakeholders

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RANGE STATEMENT	
	• involve the selection, use and supervision of appropriate procurement management methods, tools and techniques • take into account internal organisational change and external environmental change
Procurement management plan identifies and outlines:	• how procurement arrangements are communicated to stakeholders • processes to be used for procurement of resources • process for monitoring and evaluating procurement related to the project • procurement objectives, strategies and time lines • resources to be obtained against a time line and budget • responsibilities for staff/team members
Modifications may be made:	• in consultation with project team members, section heads, project manager and stakeholders • independently or with higher project authority endorsement if necessary • regularly throughout the project life cycle • taking into account internal organisational change and external environmental change
Procurement records and information may include:	• contract change proposals and approvals • contract discharge and asset disposal register • contract documentation • contract negotiation documentation • contractor selection criteria, processes and recommendations • procurement management plan • product specifications • test and acceptance procedures and documentation

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG510A Manage projects

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage a straightforward project or a section of a larger project. This unit addresses the management of projects including the development of a project plan, administering and monitoring the project, finalising the project and reviewing the project to identify lessons learnt for application to future projects. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	The unit focuses on the application of project management skills and the requirement to meet time lines, quality standards, budgetary limits and other requirements set for the project. The unit does not apply to specialist project managers. For specialist project managers, the units of competency in the Project Management competency field will be applicable.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Define project	1.1. Access ***project scope and other relevant documentation*** 1.2. Define project ***stakeholders*** 1.3. Seek clarification from ***delegating authority*** of any issues related to project and ***project parameters*** 1.4. Identify limits of own responsibility and reporting requirements 1.5. Clarify relationship of project to other projects and to the organisation's objectives 1.6. Determine and access available resources to undertake project
2. Develop project plan	2.1. Develop ***project plan*** including timelines, work breakdown structure, role and responsibilities and other details of how the project will be managed in relation to the project parameters 2.2. Identify and access appropriate ***project management tools***

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Formulate risk management plan for project, including occupational health and safety (OHS) 2.4. Develop and approve project budget 2.5. Consult team members and take their views into account in planning the project 2.6. Finalise project plan and gain any necessary approvals to commence project according to documented plan
3. Administer and monitor project	3.1. Take action to ensure project team members are clear about their responsibilities and the project requirements 3.2. Provide ***support for project team members***, especially with regard to specific needs, to ensure that the quality of the expected outcomes of the project and documented time lines are met 3.3. Establish and maintain ***required record keeping systems*** throughout the project 3.4. Implement and monitor plans for managing project finances, resources (human, physical and technical) and quality 3.5. Complete and forward project reports as required to stakeholders 3.6. Undertake ***risk management*** as required to ensure project outcomes are met 3.7. Achieve project deliverables
4. Finalise project	4.1. Complete financial record keeping associated with project and check for accuracy 4.2. Assign staff involved in project to new roles or reassign to previous roles 4.3. Complete project documentation and obtain any ***necessary sign offs*** for concluding project
5. Review project	5.1. Review project outcomes and processes against the project scope and plan 5.2. Involve team members in the project review 5.3. Document lessons learnt from the project and report within the organisation

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills
• communication and negotiation skills to work with team members and other stakeholders to maintain project schedules • literacy skills to read, write and review a range of documentation • planning and organising skills to develop, monitor and maintain implementation schedules • numeracy skills to analyse data, and to compare time lines and promotional costs against budgets • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities.
Required knowledge

• relevant legislation from all levels of government that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • environmental issues
  • OHS
• organisational structure, and lines of authority and communication within the organisation
• how the project relates to organisation's overall mission, goals, objectives and operations.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential:

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EVIDENCE GUIDE	
competency in this unit	• development of a project plan • details of monitoring arrangement/s and evaluation of the project plan's efficacy to address time lines and budgets of project • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace project documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge of how the project relates to the organisation's overall mission, goals, objectives and operations • review of project risk management plan and project plan • evaluation of project reports forwarded to stakeholders • analysis of documentation reviewing project outcomes and processes against the project scope and plan • evaluation of documentation outlining lessons learnt from the project.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other project management units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work

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RANGE STATEMENT	
situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Project scope and other relevant documentation may include:	• contract or other agreement • project brief • project plan or summary • other documents outlining expected outcomes of the project, inclusions and exclusions from project, timeframes for project, quality standards for project, project resources
Stakeholders may include:	• clients or customers (internal and external) • funding bodies • management, employees and relevant key personnel (internal and external) with special responsibilities • project sponsor
Delegating authority may include:	• customer or client • funding body • manager or management representative • project sponsor
Project parameters may include:	• finances for project • integration of project within organisation • legislative and quality standards • physical, human and technical resources available or required for project • procurement requirements associated with project • reporting requirements • risks associated with project, including OHS • scope of project • time lines
Project management tools may include:	• cost schedule control system • Critical Path Method • Gantt and bar charts • life cycle cost analysis • logistics support analysis • PERT charts • project management software • spreadsheets • technical resources required for the project, for example OHS management system tools

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RANGE STATEMENT	
Support for project team members may include:	• additional physical, human and technical resources (within allocated budget) if and as required • encouragement • feedback • learning and development • regular project team meetings • supervision, mentoring and coaching
Required record keeping systems may include systems for:	• correspondence • financial data including costs, expenditure, income generated, purchases • project outcomes • quality data including any test results • recording of time spent on project and progress in completing project • samples, prototypes, models
Risk management may include:	• changing roles and responsibilities within project team • negotiating an extension of deadline, or redefining completion or quantities or quality of outcomes • outsourcing some aspects of the project • reducing costs • researching and applying more efficient methods for completing project tasks • seeking further resources to meet deadline • sharing of ideas to gain improvements to work undertaken within the project
Necessary sign offs may be required by:	• clients, customers • funding body • management • project sponsor

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBPMG601A Direct the integration of projects

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage the integration of all functions of project management in a program or multiple project context. This covers managing conflicting priorities between projects, directing project managers in re aligning projects within the program, directing the internal environment with the needs and expectations of the external environment, and directing projects within the program throughout their life cycle. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	A program is defined as a set of interrelated projects, each of which has a project manager. Multiple projects (sometimes called a portfolio of projects) refers to a number of projects related in some way and managed by the same person as a program to achieve a common organisational objective/s. For the purposes of this unit someone who manages a suite of projects (a program) will be referred to as a program manager. The functions performed by a project manager to manage integration within individual projects are addressed in BSBPMG501A Manage application of project integrative processes.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Direct integration of all functions of project management	1.1. Support project managers in project stakeholder analysis to determine the influence of others on project outcomes 1.2. Analyse, rationalise and integrate the requirements of all projects and the inter-relationships of ***project management functions*** to determine agreed, ***achievable program objectives*** that align to organisational goals, strategies and objectives as stated in strategic planning documentation 1.3. Review, rationalise and, when approved, integrate

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ELEMENT	PERFORMANCE CRITERIA
	project plans into a structured, cohesive program plan for ongoing program management 1.4. Derive integrated program control mechanisms from project plans, to establish program control requirements 1.5. Use project plans to develop consolidated program budgets, schedules and interdependencies, and to identify program risks
2. Direct the internal project environment to meet external needs and expectations	2.1. Direct the ***internal project working environment*** to ensure project managers' work is conducted effectively throughout multiple, aligned project life cycles 2.2. Establish and maintain links to direct the alignment between projects and organisational objectives within the program 2.3. Evaluate project proposals (scope definitions) against the organisation's strategic objectives 2.4. Coordinate and direct conflicting requirements of individual projects to achieve program objectives 2.5. Modify, where necessary, individual project objectives to achieve overall program objectives 2.6. Coordinate the impact of ***external environmental influences*** on individual projects to achieve program objectives
3. Direct projects throughout project life cycles	3.1. Direct all project managers to provide project phases, approval points, review points and other milestones, to allow program integration 3.2. Establish project baselines and report progress in relation to these baselines, to measure program performance throughout the business reporting cycle 3.3. Progressively review project baselines to ensure nominated benefits are consistent with organisational expectations 3.4. Direct ***finalisation plans***, ***procedures and activities*** to ensure final outcomes are met and that projects meet agreed program objectives 3.5. Review projects finalised in a program management reporting period to evaluate benefits to the business 3.6. Pass on integration management lessons learned to higher project authority and provide feedback for application to other projects

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills
• high level leadership skills to gain confidence and trust from people working on all levels • literacy skills to communicate decisions and to write quality reports • high level prioritising, planning and organising skills • innovation skills to develop new and better systems for managing in complex situations • problem-solving skills to deal with project management issues.
Required knowledge
• program planning • methodologies, tools and techniques for project management • leadership models • relevant legislation, codes and national standards.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated experience in directing an integrated range of concurrent projects so that project outcomes and stakeholders expectations are met • knowledge of relevant legislation, codes and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to a range of project documentation • consideration of feedback from project stakeholders.

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance of scope management techniques by the candidate • analysis of responses addressing different program management case studies and scenarios • oral or written questioning to assess knowledge of strategies for managing project integration and their application to different situations • assessment of consolidated program budgets, schedules, interdependencies and identified program risks • assessment of project baselines established and progress reported in relation to these baselines • review of program plan.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units in the Advanced Diploma of Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Project management functions are:	• communications • cost • human resources • procurement • quality • risk

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RANGE STATEMENT	
	• scope • time
Achievable program objectives may include:	• client's objectives, for example maximum value for money or maximum performance at minimum cost • end-user/s objectives, for example maximum performance as well as optional extras • higher project authorities' objectives (that is, management/projects governance group), for example reputation, retention of market share, buying into market within the constraints of performance, time, cost, quality, resources and skills • organisation's objectives, for example quantifiable benefits • supplier's/contractor's objectives, for example minimum cost, minimum time and acceptable quality
Internal project working environment may include:	• computing support and integrated computer networks • identity and differentiation of the program's projects within the larger environment • personal working conditions (physical and emotional) • physical location of program project managers, personnel and equipment • physical location of projects within the organisation • teams and interpersonal dynamics
External environmental influences may include:	• employee representative groups, such as unions, professional associations and lobby groups • external stakeholder expectations • parent organisation, enterprise and/or industry • physical environment, for example geography, ecology and environmental sensitivity • political, environmental and societal influences • public and media interest
Finalisation plans, ***procedures and activities*** may include:	• assessment of stakeholder satisfaction against expectations • evaluation of projects completed in a reporting period

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RANGE STATEMENT	
	• evaluation of projects for benefits derived • forwarding program progress report to higher governance authority for projects • review of success/failure criteria for projects completed in a given reporting period • settling of financial liabilities for projects completed in a consolidated budget context • transition of responsibility/ownership of projects' deliverables/products for those projects that concluded in a reporting/management period (such as financial year)

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG602A Direct the scope of a project program

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to direct the scope of projects within a program or multiple projects context. It covers the management of project authorisations and defining, planning and managing the program scope. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	A program is defined as a set of interrelated projects, each of which has a project manager. Multiple projects (sometimes called a portfolio of projects) refers to a number of projects related in some way and managed by the same person as a program to achieve a common organisational objective/s. For the purposes of this unit someone who manages a suite of projects (a program) will be referred to as a program manager. The functions performed by a project manager to manage scope within individual projects are addressed in BSBPMG502A Manage project scope.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Authorise projects	1.1. Analyse ***needs***, in consultation with client and relevant stakeholders, to justify each project and to designate project managers 1.2. Conduct project selection and prioritisation within guidelines provided by, or under the direction of, a relevant (governance) authority 1.3. Make ***project authorisation recommendations*** to relevant authority as the basis for future project management activity, and commitment of resources and effort
2. Define and plan program scope	2.1. Define projects' objectives, major deliverables and resource requirements at the project and program level, and confirm them with the governance group or relevant authority 2.2. Determine and agree measurable project outcomes and benefits to enable quantified evaluation of

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ELEMENT	PERFORMANCE CRITERIA
	program performance 2.3. Develop, agree on and communicate scope definition, ***scope management*** strategies and plans 2.4. Align program scope to business requirements and organisational strategy
3. Manage program scope	3.1. Conduct regular program reviews to measure ***project performance*** and to ensure that stated program and business/strategic objectives are met 3.2. Establish and maintain ***change management system*** to form the basis of ongoing scope management 3.3. Conduct ***reviews of scope changes*** and take action to ensure that project and program objectives are achieved or modified 3.4. Measure project outcomes against defined program scope and aligned strategic objectives 3.5. Communicate results of program outcomes to relevant authority 3.6. Pass on scope management lessons learned to higher project authority for application in planning and implementation of later projects within the program

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• high level literacy skills to review and amend project plans, to communicate decisions and to write quality reports • high level analysis, planning, organising, problem-solving and evaluating skills in relation to project scope management • self management skills to prioritise actions for successful outcomes • negotiation skills to control proposed changes in scope.
Required knowledge
• scope management plans, methodologies, techniques and tools • project life cycle and the significance of scope management • typical challenges and issues encountered in project scope management and options for addressing these.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated experience in directing a range of concurrent projects so that scope is successfully managed across all projects • knowledge of a broad range of project scope management tools, methodologies and techniques.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation, including feedback from stakeholders, which reflects how scope was managed for projects.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance of scope management techniques by the candidate • analysis of responses addressing different project scope management case studies and scenarios • oral or written questioning to assess knowledge of strategies for managing project scope and their application to different situations • review of project authorisation recommendations • assessment of measurement of project performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Advanced Diploma of Project Management.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Needs may be:	• activity-oriented, for example to stage major sporting events • improvement-oriented, for example to find better way/s of doing something • outcome-oriented, for example to fulfil needs • product-oriented, for example to acquire new computer systems or buildings
Project authorisation recommendations may include:	• broad details of required project outcomes and objectives • major projects phases, activities and milestones that will require timing coordination across the program (particularly as new approved projects enter the program) • project managers' terms of reference, authorisations and limitations directed by the program manager • relationship between multiple project objectives and the programs and strategic objectives of the organisation
Scope management may include:	• controlling program scope creep, that is incremental increases to scope, to accommodate wishes rather than needs • determining that a scope change has occurred or is about to occur • managing factors which influence changes to scope • managing scope changes when they occur • managing the effect of scope changes on other areas and on the achievement of multiple project objectives • progressive refinement of scope throughout multiple project life cycles
Project performance may include:	• time and resources spent on the projects, as compared to baseline data • projects' progress in terms of time and

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RANGE STATEMENT	
	resources
Change management system may include:	• change to control boards/committees • configuration management • documentation • impact analysis • risk analysis
Reviews of scope changes may include:	• formal agreements, that is contracts, sub-contracts and memoranda of understanding • major elements of the program liable to change, for example deletion of a line of business endeavour, new projects prioritising program and deletion of poorly performing projects • potential, perceived and actual changes • program documentation, including plans, integrated schedules, integrated budgets and integrated (program) risk analysis

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG603A Direct time management of a project program

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to direct time management across projects so that key deliverables meet project and program schedules. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	A program is defined as a set of interrelated projects, each of which has a project manager. Multiple projects (sometimes called a portfolio of projects) refers to a number of projects related in some way and managed by the same person as a program to achieve a common organisational objective/s. For the purposes of this unit someone who manages a suite of projects (a program) will be referred to as a program manager. The functions performed by a project manager to manage time and scheduling within individual projects are addressed in BSBPMG503A Manage project time.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Direct project schedule development	1.1. Determine from individual project plans the duration, effort, sequence and interdependencies of major activities and milestones to form the basis of the program schedule 1.2. Direct project managers by the use of ***time management*** methods, ***techniques and tools***, preferred schedules, ***time management plans***, resource allocation and financial requirements to enable continuous updating and refining of the program schedule 1.3. Formalise and communicate project schedules, with agreement, to stakeholders as the basis for planning, implementation and review of progress
2. Manage program schedules	2.1. Develop, implement and modify mechanisms to monitor, control, record and report actual progress in relation to the agreed schedule and plans

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ELEMENT	PERFORMANCE CRITERIA
	2.2. Conduct ongoing analysis to identify and forecast variances and trends, and to develop responses so that projects meet their schedules 2.3. Manage durations of key activities and interdependencies between projects to enable financial and resource rationalisation across the program, to meet strategic expectations within the management/reporting period of the program 2.4. Review progress and refine the schedule throughout the program life cycle to ensure consistency with changing scope, objectives and constraints related to time and resource availability 2.5. Ensure responses to perceived, potential or actual project schedule changes are authorised to achieve program objectives
3. Analyse time management outcomes	3.1. Review and analyse multiple project and program outcomes from available ***records*** and information to determine the effectiveness of the schedule and time management processes 3.2. Pass on lessons learned to higher project authority and provide feedback for application, planning and implementation of later projects within the program

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills
• high level leadership skills to inspire trust and confidence in all stakeholder groups • literacy skills to communicate decisions and to write quality reports • communication and interpersonal skills to convey expectations, negotiate, resolve conflict and motivate performance • planning and organising skills to ensure that time lines are met across projects • time management skills (of self and others) • problem-solving skills to address time management issues.
Required knowledge
• relationship between time, cost and resources to the project management framework

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REQUIRED SKILLS AND KNOWLEDGE
• time management and estimating • methodologies, techniques and tools, their capabilities, limitations, applicability and outcomes.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated experience in directing project work so that timelines are met across a range of concurrent projects • knowledge of the relationship between time, cost and resources to the project management framework.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation • consideration of feedback from project team and stakeholders as to how time was managed.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance of program time management by the candidate • analysis of responses addressing different project time management case studies and scenarios • oral or written questioning to assess knowledge of strategies for managing project time and their application to different situations • review of how project schedules were formalised and communicated • evaluation of ongoing analysis to identify and forecast variances and trends

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EVIDENCE GUIDE	
	• review of progress and refinement of the schedule throughout the program life cycle.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Advanced Diploma of Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Time management may:	• be conducted non-routinely to meet complex, changing circumstances • be done by taking the lead in a team environment • involve consultation with project managers and selective involvement of stakeholders • involve the direction of the use of appropriate time management methods, processes, procedures, tools and techniques • take into account the impact of organisational and environmental change on the program's projects and vice versa
Techniques and tools may include:	• assessing and reporting the potential impact of multiple project timings and their potential for change on the program, and therefore the organisation • collating and using the products of specialist time analysis to make program-wide time management decisions • directing qualitative and/or quantitative time analysis, such as schedule simulation, decision analysis, contingency planning and alternative strategy development

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RANGE STATEMENT	
	• using personal experience and/or subject matter experts
Time management plans may include:	• alternative schedule management strategies and actions • assigned schedule management responsibilities • contingency plans • formal arrangements • important milestones and critical interdependencies between projects • program consolidated schedule • responsibility assignment • sub-schedules
Records may take the form of:	• diaries, incident logs, occurrence reports and other such documentation • gantt, PERT and other scheduling charts • lists of variances, trends and forecasts of potential schedule events • program and/or organisation files and records • records of analysis, evaluation of options and selection processes • records of responses, results and lessons learned

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBPMG604A Direct cost management of a project program

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to analyse, coordinate, and refine the budgets of multiple projects that contribute to an overall program budget. It covers directing project budget development, managing program costs and directing the financial completion of projects. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	A program is defined as a set of interrelated projects, each of which has a project manager. Multiple projects (sometimes called a portfolio of projects) refers to a number of projects related in some way and managed by the same person as a program to achieve a common organisational objective/s. For the purposes of this unit someone who manages a suite of projects (a program) will be referred to as a program manager. The functions performed by a project manager to manage costs within individual projects are addressed in BSBPMG504A Manage project costs.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Direct project budget development	1.1. Direct project managers to determine resource requirements for individual tasks, in consultation with appropriate stakeholders, to develop a project budget which contributes to the program budget 1.2. Direct project ***cost estimation*** to enable budgets and cost management processes to be developed for the project life cycles 1.3. Direct and authorise cost strategies and ***cost management plans*** to ensure clarity of understanding and ongoing ***management of project finances*** and the program budget overall
2. Manage program costs	2.1. Develop and maintain ***cost management systems*** to direct monitoring of actual expenditure and to control costs throughout multiple project life cycles

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ELEMENT	PERFORMANCE CRITERIA
	and for the program overall 2.2. Conduct analysis, evaluate options and implement responses to project cost variations to maintain control over changing financial and overall program objectives 2.3. Monitor internal and external influences on program costs and, where necessary, seek approval from business management for changes to the approved program budget
3. Direct financial completion	3.1. Provide direction for project ***finalisation activities*** to achieve integrated financial and physical project completion within program and therefore client and organisational expectations 3.2. Review project outcomes from available ***records*** at the finalisation of each project, and analyse information to determine the effectiveness of cost management systems 3.3. File program lessons learned as a resource for future reference and, where necessary, refer to higher project authority for application in planning strategic direction changes and business outcomes for future projects

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- technology skills to oversee project financial performance
- numeracy skills to develop and interpret project budgets and to provide financial information
- literacy skills to communicate decisions and to write quality reports
- leadership skills to inspire trust and confidence in teams, managers and stakeholders
- communication and interpersonal skills to convey expectations, resolve conflict and motivate performance
- planning skills to review project resource requirements and to cost estimates
- problem-solving skills to resolve costing issues.

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge
• regulatory and legislative financial reporting requirements • methods for costing and estimating project resources • methods for monitoring and controlling project expenditure.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated experience in directing cost management approaches across a range of concurrent projects • knowledge of regulatory and legislative financial reporting requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to financial documentation and files • consideration of feedback from project team and other stakeholders as to how program costs were managed.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance of scope management techniques by the candidate • analysis of responses addressing different project cost management case studies and scenarios • oral or written questioning to assess knowledge of strategies for managing project costs and their application to different situations • review of written reports on financial outcomes of

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EVIDENCE GUIDE	
	projects • review of how cost management systems were developed and maintained.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units in the Advanced Diploma of Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Cost estimation may take account of:	• availability of information at the time • contingencies to allow for identified risks and uncertainty • government regulations, industry codes of practice and organisational influences • overhead and profit margin • stage in each project's life cycle
Cost management plans and activities throughout program management may:	• be conducted non-routinely to meet complex and changing circumstances • be done independently or by taking the lead in a team environment • involve consultation with, and selective involvement of, appropriate project stakeholders • involve the selection, modification and supervision of the use of appropriate cost management methods, processes, procedures, tools and techniques • take into account the impact of organisational and environmental change on the project/program and vice versa

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RANGE STATEMENT	
Management of project finances may include:	• approval processes • audit and review • communication, reports and briefs • financial authorisations/delegations • invoice procedures
Development of ***cost management systems*** may involve:	• application of personal judgement • authorising and revising financial delegations • cost modelling and estimating • financial analysis, for example benefit-cost analysis, cash flow analysis, earned value analysis • modification of program methodologies and procedures • program obligation, expenditure forecasting and long-term planning • progress and financial change management

Finalisation activities may include:	• comparison of one project's cost management outcomes with success rates of other projects and with overall (organisation) budgetary expectations
	• direction of project team managers in their:
	  • final audit/reconciliation
	  • close-out of account codes and other financial documentation
	  • settling of financial liabilities
	  • transfer of assets to the client or originating owner
	  • transition of responsibility/ownership of project deliverables/products
	  • warranty requirements resolution

Records may take the form of:	• budgets, commitment and expenditure • cost management lessons learned • cost management plans • financial charts and graphs • financial summaries • program and/or organisation files and records • records of potential and actual costs • reports to higher authority

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG605A Direct quality management of a project program

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to direct quality management across multiple projects and within the overall program. It covers directing the development of quality requirements, directing quality assurance management, and reviewing and improving the quality of projects and the program. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	A program is defined as a set of interrelated projects, each of which has a project manager. Multiple projects (sometimes called a portfolio of projects) refers to a number of projects related in some way and managed by the same person as a program to achieve a common organisational objective/s. For the purposes of this unit someone who manages a suite of projects (a program) will be referred to as a program manager. The functions performed by a project manager to manage quality within individual projects are addressed in BSBPMG505A Manage project quality.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Direct quality requirements development	1.1. Direct reviews and consultation to ensure that the organisation's quality objectives, standards, levels and criteria are applied at the project level, in consultation with stakeholders 1.2. Modify ***quality management*** methods, techniques and tools to the requirements of the program, as necessary 1.3. Identify and communicate program quality criteria to project managers for implementation 1.4. Direct project managers to develop and implement quality plans that will be used as the basis for performance measurement
2. Direct project quality assurance	2.1. Analyse results of project activities and product performance to determine compliance with agreed

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ELEMENT	PERFORMANCE CRITERIA
management	quality standards throughout the project life cycles within the program 2.2. Identify causes of unsatisfactory results in consultation with project managers, clients and stakeholders, and initiate appropriate actions to enable continuous improvement in quality outcomes 2.3. Direct inspections of quality processes and analyse results to determine compliance with quality standards set for the overall program and the organisation 2.4. Develop and maintain a ***quality management system*** to enable effective management and communication of quality issues and outcomes
3. Improve program and project quality	3.1. Continually review and modify the quality management system throughout project activities to ensure project team commitment to continuous improvement of quality processes and outcomes 3.2. Direct project outcomes review and analysis against performance criteria to determine the effectiveness of the quality management system 3.3. Aggregate and use ***quality improvements*** and lessons learned to benefit the business and, where appropriate, pass on program initiatives/projects to organisational management for consideration in support of strategic planning and (re)direction

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• leadership, communication and interpersonal skills to foster compliance with quality benchmarks • literacy skills to communicate decisions and to write quality reports • skills in analysing, interpreting and reviewing data to assess performance against quality benchmarks • problem-solving skills to address gaps in quality assurance.
Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE
• range of quality management methods, techniques, tools and systems and their various applications • relevant Australian and international standards.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated experience in directing the successful application of quality management across a range of concurrent projects • knowledge of relevant Australian and international standards.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace quality documentation • consideration of feedback from project team/s and stakeholders as to how quality was managed.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance of scope management techniques by the candidate • analysis of responses addressing different project quality management case studies and scenarios • oral or written questioning to assess knowledge of strategies for managing project quality and their application to different situations • assessment how program quality criteria were identified and communicated • review of actions initiated to enable continuous improvement.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units in the Advanced Diploma of Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Quality management may:	• be conducted non-routinely to meet complex and changing circumstances • be done independently or by taking the lead in a team environment • involve consultation with and direction to, project managers regarding their selective involvement of appropriate project stakeholders • involve the overall direction to project managers for the selection, modification and supervision of the use of appropriate quality management methods, processes, procedures, tools and techniques • take into account the impact of organisational and environmental change on the program and vice versa
Quality management system may include:	• ISO 9000 series or as designed to meet the specific needs of the project
Quality improvements may include:	• formal practices, such as total quality management or continuous improvement • less formal processes which improve both the product quality and processes of the project, for example client surveys to determine client satisfaction with project performance

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG606A Direct human resources management of a project program

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to direct human resource organisation and staffing across the program, to direct project managers in relation to staff performance and to provide leadership within the program. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	A program is defined as a set of interrelated projects, each of which has a project manager. Multiple projects (sometimes called a portfolio of projects) refers to a number of projects related in some way and managed by the same person as a program to achieve a common organisational objective/s. For the purposes of this unit someone who manages a suite of projects (a program) will be referred to as a program manager. The functions performed by a project manager to manage human resources within individual projects are addressed in BSBPMG506A Manage project human resources.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Direct human resources management planning	1.1. Direct human resource requirement analysis for projects to determine numbers and skill levels required for the overall program 1.2. Direct stakeholder assessment to establish a basis for stakeholder management within projects and the overall program 1.3. Direct responsibility assignment for project activities and tasks, and establish authorisation protocols
2. Manage program organisation and staffing	2.1. Determine resource requirements for projects in consultation with project managers and appropriate stakeholders, to establish program staffing levels, allocation to projects and required competencies 2.2. Direct ***project organisation and structure*** to optimise alignment of individual and group

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ELEMENT	PERFORMANCE CRITERIA
	competencies within projects 2.3. Direct recruitment of ***staff*** for allocation to projects or reallocation within the organisation, within agreed delegated authority, to meet competency requirements throughout the program 2.4. Direct project managers' use of ***human resources management*** (***HRM***) ***methods***, ***techniques and tools***, and modify for program requirements 2.5. Utilise organisational HRM system and HRM processes across projects
3. Direct project staff performance management	3.1. Obtain agreement of performance measurement criteria for clarity of roles and responsibilities and ongoing assessment 3.2. Ensure systems for ongoing ***development and training*** of personnel across the program are established and implemented by project managers 3.3. Measure individuals' performance against agreed criteria and authorise actions to overcome shortfalls in performance and encourage career progression
4. Provide overall leadership to project teams	4.1. Manage a system of continuous improvement of staff to enhance program effectiveness 4.2. Analyse individual and team performance and morale levels and take action where necessary 4.3. Direct procedures for interpersonal communication, counselling and conflict resolution by project managers, and review results to maintain and promote a positive working environment 4.4. Identify and positively manage intra-organisational and intra-project conflict to maximise achievement of program objectives 4.5. Aggregate HRM lessons learned for application in planning and, where appropriate, pass on information to others for consideration in strategic planning and direction

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills
• planning skills to identify human resource requirements across the program • literacy skills to communicate decisions and to write quality reports • high level leadership skills to inspire trust and confidence in teams, managers and stakeholders • communication and interpersonal skills to convey expectations, negotiate, resolve conflict and motivate performance • problem-solving skills to address HRM issues across the program • coaching and mentoring skills.
Required knowledge
• human resource management methods, techniques and tools • relevant legislation • models of performance management and performance development.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated experience in directing human resources across a range of concurrent projects so that project objectives are achieved • knowledge of relevant legislation .
Context of and specific resources for assessment	Assessment must ensure: • access to workplace HRM documentation • consideration of feedback from project teams and stakeholders as to how human resource management was handled.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of

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EVIDENCE GUIDE	
	portfolios of evidence and third party workplace reports of on-the-job performance of scope management techniques by the candidate • analysis of responses addressing different project scope management case studies and scenarios • oral or written questioning to assess knowledge of strategies for managing project human resources and their application to different situations • observation of demonstrated techniques in performance feedback and/or conflict resolution • observation of performance in role plays • review of the measurement of individuals' performance against agreed criteria • evaluation of how the staff continuous improvement system was managed • assessment of analysis of individual and team performance and morale levels.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units in the Advanced Diploma of Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Project organisation and structure may be affected by external influences such as:	• accepted work practices • legislation, including anti-discrimination, equal employment opportunity, affirmative action and occupational health and safety • workplace bargaining
Staff may:	• be external to the organisation, such as consultants, collaborative or alliance agencies

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RANGE STATEMENT	
	and external authorities • come from within the organisation, such as staff on loan from other programs/projects
Human resources management methods, techniques and tools may include:	• conflict resolution • HRM forecasts, staffing plans and job descriptions • individual and group competency identification and development • performance monitoring, assessment and reporting • staff recruitment and reallocation
Development and training may be formal or informal, and may include:	• general management • interpersonal communications • project administration, for example computer applications, filing systems • project management • specialist/professional skills and career progression • team building and group activities

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG607A Direct communications management of a project program

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide the critical link between people, ideas and information at all stages in the life cycles of multiple projects across a program. It covers directing project communications and information management, managing program communications and analysing communications management outcomes for projects and programs. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	A program is defined as a set of interrelated projects, each of which has a project manager. Multiple projects (sometimes called a portfolio of projects) refers to a number of projects related in some way and managed by the same person as a program to achieve a common organisational objective/s. For the purposes of this unit someone who manages a suite of projects (a program) will be referred to as a program manager. The functions performed by a project manager to manage communications within individual projects are addressed in BSBPMG507A Manage project communications.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Direct planning of project communications	1.1. Direct project information requirements in consultation with appropriate stakeholders as the basis for projects and program communications planning 1.2. Direct ***communications management plans and activities*** to ensure clarity of understanding and achievement of multiple project objectives at all ***levels*** 1.3. Develop ***project management information system*** (PMIS), structure and procedures to maintain the quality, validity, timeliness and integrity of information and communication across the program and in regard to organisational strategic management
2. Direct management of	2.1. Direct the generation, gathering, storage, retrieval,

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ELEMENT	PERFORMANCE CRITERIA
project information	analysis and dissemination of information by project staff and stakeholders to improve decision making processes and communications across the program and between the projects 2.2. Direct ***information validation*** processes for development, management and modification to ensure consistent quality and accuracy of data across the program
3. Manage program communications	3.1. Develop and manage formal and informal communication networks between the organisation's management structure, program, projects and key stakeholders to ensure effectiveness throughout the multiple life cycles of projects within the program 3.2. Address potential, perceived and actual problems with communication and management information systems through project managers, and ensure remedial actions are authorised to ensure project, program and organisational objectives are met 3.3. Manage customer relationships beyond the delegated responsibility of project managers to ensure clarity of understanding of objectives and to minimise conflict across the program
4. Analyse communications management outcomes	4.1. Direct project finalisation activities to ensure ownership of, and responsibility for, information outcomes 4.2. Review and analyse project outcomes to determine the effectiveness of management information and communications systems 4.3. Aggregate and use lessons learned across multiple projects for other applications in the program and the organisation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• technology skills to direct the management and flow of project information and communications

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REQUIRED SKILLS AND KNOWLEDGE
• planning skills to identify project and program information requirements • literacy skills to communicate decisions and to write quality reports • problem-solving skills to address communication management problems • interpersonal skills to communicate with customers and to manage customer relationships and networks • analytical skills to review and analyse project outcomes.
Required knowledge
• PMIS structures and options • information validation processes and their application to various contexts • new technologies for communications and their relative strengths and weaknesses.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated experience in directing communications and information across a range of concurrent projects • knowledge of PMIS structures and options.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of relevant workplace documentation (including electronic media) • consideration of feedback from project teams and stakeholders as to how communications were managed.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance of scope management techniques by the candidate

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EVIDENCE GUIDE	
	• analysis of responses addressing different project communications management case studies and scenarios • oral or written questioning to assess knowledge of strategies for managing project communications and their application to different situations • review of the project management information system developed • review of how communication and management information systems were used to address potential, perceived and actual problems • evaluation of how project outcomes were reviewed and analysed to determine the effectiveness of management information and communications systems.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units in the Advanced Diploma of Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Communications management plans and activities may:	• be conducted non-routinely to meet complex, changing circumstances • be done independently or by taking the lead in a multiple teams environment • involve consultation with project managers and selective involvement of appropriate project stakeholders • involve the selection, modification and supervision of appropriate communications management methods, processes, procedures

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RANGE STATEMENT	
	and tools • take into account the impact of organisational and environmental change on the program and vice versa
Levels may include:	• organisation • operations • program • projects
Project management information system may include:	• hierarchy of decision making responsibility/authority • individual and group authority and responsibilities • limitations and restrictions on subject matter and methods of communication • network structures, processes and procedures for storage and communication of information • types, responsibilities, distribution and regularity of reports, as well as follow-up procedures
Information validation processes may be influenced by:	• age of the information • changes to standards, regulations or limits since information was compiled • cost of the validation process • degree of exposure to mis-information and dis-information • language (translated or converted data may need special attention) • level of detail of information (too much or too little) • potential impact of the information on the program outcome

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG608A Direct risk management of a project program

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage factors that might adversely affect the project program and organisational outcomes. It covers directing the planning and management of project risks, managing risks to the overall program and assessing risk management outcomes for the program and the organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	A program is defined as a set of interrelated projects, each of which has a project manager. Multiple projects (sometimes called a portfolio of projects) refers to a number of projects related in some way and managed by the same person as a program to achieve a common organisational objective/s. For the purposes of this unit someone who manages a suite of projects (a program) will be referred to as a program manager. The functions performed by a project manager to manage risk within individual projects are addressed in BSBPMG508A Manage project risk.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Direct planning of project risk management	1.1. Direct potential, perceived and actual risk events for identification, documentation and analysis, in consultation with project managers and appropriate stakeholders, as the basis for project ***risk management planning***
	1.2. Select and modify project ***risk management methods***, ***techniques and tools*** for project managers to analyse information, evaluate options and determine preferred risk approaches within the overall program environment
	1.3. Direct development, communication and implementation of project ***risk management plans*** and strategies to ensure clarity of understanding and achievement of project objectives across the program

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ELEMENT	PERFORMANCE CRITERIA
	1.4. Develop and maintain a project risk management system to enable effective management and communication of risk events, responses and results to stakeholders across projects within the program
2. Direct management of project risk and manage program risk	2.1. Manage the program in accordance with agreed project risk management plans 2.2. Review progress, analyse variance and initiate risk responses to achieve program and multiple project objectives in changing environments 2.3. Direct risks to multiple project outcomes for monitoring, and ensure remedial actions are authorised to achieve project objectives
3. Assess project and program risk management outcomes	3.1. Review and analyse project outcomes to assess the effectiveness of the project risk management system for projects, program and organisational outcomes 3.2. Aggregate, analyse and structure lessons learned, for project managers and senior management to undertake strategic review and planning

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to plan and review risk management approaches
- literacy skills to communicate decisions and to write quality reports
- initiative to identify and address risks leading to negative consequences for projects
- problem-solving skills to initiate risk responses in changing environments.

Required knowledge

- risk management tools, frameworks, systems, methodologies and standards.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated experience in successfully directing risk management efforts across a range of concurrent projects • knowledge of risk management tools, frameworks, systems, methodologies and standards.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace risk management documentation • consideration of feedback from project teams and stakeholders as to how risks were managed.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance of scope management techniques by the candidate • analysis of responses addressing different project risk management case studies and scenarios • oral or written questioning to assess knowledge of strategies for managing project risks and their application to different situations • review of the development, communication and implementation of project risk management plans.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units in the Advanced Diploma of Project Management.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Risk management planning may:	• be conducted substantially non-routinely to meet complex and changing circumstances • be done independently or by taking the lead in a multiple projects team environment • involve consultation with project managers and with selective involvement of stakeholders within and external to the organisation • involve the selection, modification and direction of the use of appropriate risk management methods processes, procedures, tools and techniques • take into account the impact of organisational and environmental change on the program and vice versa
Risk management methods, ***techniques and tools*** may involve:	• assessing and reporting the potential impact of multiple projects' risk on the organisation • calling upon personal experience and/or subject matter experts • collating and using the products of specialist risk analysis to make program-wide risk management decisions • conducting or directing qualitative and/or quantitative risk analysis, such as schedule simulation, decision analysis, contingency planning and alternative strategy development
Risk management plans may include:	• assigned risk responsibilities • contingency plans • formal arrangements • occupational health and safety (OHS) risks • potential risk events • preferred and alternative risk management strategies and actions • responsibility assignment

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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BSBPMG609A Direct procurement and contracting for a project program

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to direct the management of contracting and procurement activities across projects and programs. It covers setting up the contracting process, directing the management of contract and procurement processes and finalising contracts for projects across the program. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	A program is defined as a set of interrelated projects, each of which has a project manager. Multiple projects (sometimes called a portfolio of projects) refers to a number of projects related in some way and managed by the same person as a program to achieve a common organisational objective/s. For the purposes of this unit someone who manages a suite of projects (a program) will be referred to as a program manager. The functions performed by a project manager to manage procurement within individual projects are addressed in BSBPMG509A Manage project procurement. It should be noted that conflicting priorities between projects are managed with higher project authority support, in this case project governance committees or senior management.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Direct planning for project contracting and procurement	1.1. Direct product specifications and procurement requirements for procurement and contract planning, in consultation with appropriate stakeholders 1.2. Direct development of ***procurement strategies***, ***methods and management plans*** in line with project objectives across the program
2. Direct set up of contract and procurement process	2.1. Direct project managers to source organisations that meet procurement requirements 2.2. Establish selection processes and selection criteria, in consultation with stakeholders, and arrange for

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ELEMENT	PERFORMANCE CRITERIA
	communication to prospective contractors 2.3. Ensure contract and procurement actions accord with organisation and program objectives
3. Direct management of contract and procurement process	3.1. Provide direction for requirements of ***proposals*** and arrange communication to prospective contractors 3.2. Ensure responses are evaluated and preferred contractors are selected in accordance with agreed selection processes 3.3. Direct negotiation of contract terms and conditions between client and preferred contractor
4. Direct management of contracts	4.1. Direct management of contract and procurement activities in accordance with program contract and procurement management guidelines 4.2. Provide direction for regular reviews from available ***records*** and information, and ensure variances are analysed and changes are agreed for implementation 4.3. Ensure project managers work within the legal and organisational framework for contracts 4.4. Identify potential, perceived and actual contractual conflicts and approve remedial actions to minimise disruption
5. Direct finalisation of contracts	5.1. Direct finalisation activities for management of contract deliverables in accordance with contractual project and program requirements 5.2. Direct review and analysis of project outcomes to determine the effectiveness of contract and procurement processes and procedures 5.3. Aggregate and use lessons learned for application in planning and implementation of later projects within the program and, where appropriate, pass on to organisational management for use in strategic planning

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

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REQUIRED SKILLS AND KNOWLEDGE
• literacy skills to communicate decisions, to comprehend complex contractual provisions and to write quality reports • negotiation skills to set up contracts, to agree prices and terms, and to resolve disputes • planning and organising skills to ensure procurement processes are properly established and sequenced • analytical skills to review program performance and to recommend improvements.
Required knowledge
• contract management and legal obligations of both parties • procurement processes and options.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated experience in successfully directing procurement and contract management processes across a range of concurrent projects • knowledge of contract management and legal obligations.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace contractual and procurement documentation • consideration of feedback from project team and stakeholders as to how procurement and contractual processes were handled.
Method of assessment	A range of assessment methods should be used to assess practical skill and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance of scope

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EVIDENCE GUIDE	
	management techniques by the candidate • analysis of responses addressing different project scope management case studies and scenarios • oral or written questioning to assess knowledge of strategies for managing project procurement and contracts, and their application to different situations • review of established selection processes and selection criteria and how they were communicated to prospective contractors • assessment of identified potential, perceived and actual contractual conflicts and remedial actions taken to minimise disruption.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units in the Advanced Diploma of Project Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Procurement strategies, ***methods and management plans*** may include:	• conflict resolution processes • contract performance plans and an associated performance monitoring processes • contractor and sub-contractor responsibilities, controls and reporting relationships • explanatory information (for example background, restrictions or expectations) relating to special terms and conditions, planning for long lead-time items and critical program components, and transition plans • procurement, test and acceptance procedures and payment schedules

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RANGE STATEMENT	
Proposals may take the form of:	• expressions of interest • quotations • submissions • tenders
Records may take the form of:	• contract analysis, evaluation of options and strategy development • contract discharge procedures and outcomes • contract negotiation documentation, for example contract negotiation strategies, plans, team and individual directives • contractor identification, evaluation and selection records • development and management of contract change procedures • procurement management lessons learned • procurement management plans • product specifications • progress measurement and conflict resolution process records • test and acceptance procedures

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Project Management

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBPRO301A Recommend products and services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to provide advice and information within an organisation about the development and distribution of its products and services. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts. They may exercise discretion and judgement using appropriate knowledge of products and services to provide technical advice and support to a team.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop and maintain knowledge of products and services	1.1. Actively and regularly research knowledge and understanding of ***industry products and services*** using ***authoritative sources*** 1.2. Use available ***product and service documentation*** to identify and understand characteristics of products and services, and to make comparisons with other products and services 1.3. Accurately document and maintain ***information*** on products and services in a format consistent with ***organisational requirements*** 1.4. Apply acquired knowledge to improve quality within personal work areas
2. Recommend products and services	2.1. Ensure that recommendations on products and services are in line with organisational requirements 2.2. Provide recommendations that emphasise ***product and service issues*** relevant to client needs 2.3. Ensure that evidence in support of recommendations is verifiable and presented in a suitable format 2.4. Structure recommendations to identify clear benefits to clients and the organisation
3. Advise on promotional activities	3.1. Provide advice that is clear, is supported by verifiable evidence and is compatible with organisational requirements

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ELEMENT	PERFORMANCE CRITERIA
	3.2. Ensure that promotional documentation and materials are appropriate to presentation of the organisation's products and services 3.3. Ensure that costs of promotional activities conform to budget resources 3.4. Estimate impact of ***promotional activities*** from ***verifiable customer feedback sources*** 3.5. Evaluate the benefits of promotional activities and incorporate in plans for future promotional activities

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to read and understand a variety of texts; to prepare general information and papers according to target audience; and to edit and proofread texts to ensure clarity of meaning, and accuracy of grammar and punctuation
- technology skills to select and use technology appropriate to a task
- communication skills to monitor and advise on customer service strategies
- problem-solving skills to deal with customer enquiries or complaints
- analytical skills to identify trends and positions of products and services.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety (OHS)
- organisation's products and services
- organisational policies and procedures for customer service including handling customer complaints
- product and service standards and best practice models
- principles and techniques of public relations and product promotion
- mechanisms to obtain and analyse customer feedback.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • assessing and reporting on customer satisfaction • identifying commercial characteristics of products and services • knowledge of product and service standards and best practice models. • preparing and structuring advice on products and services • researching market availability of products and services.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of promotional strategies • examples of documents relating to customer service standards and policies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • evaluation of promotional activities plans • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of promotional strategies and sources of product

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EVIDENCE GUIDE	
	information • review of documentation outlining information on products and services • review of products and services recommendations.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • sales and/or customer service units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Industry products and services may include:	• competitor products and services • complementary products and services • emerging products and services • historical products and services • organisation's products • specified range of products and services within an organisation's offerings
Authoritative sources may include:	• authorised suppliers • industry associations • industry conferences • recognised industry media sources
Product and service documentation may include:	• colleagues' knowledge • consumer reports • industry reports • marketing data • operational guidelines • sales figures
Information may include:	• competitive features of products or services • cost and production data

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RANGE STATEMENT	
	• distribution processes • innovations • problems with products or services • product trends • sales records (monthly forecasts, targets achieved) • sales trends
Organisational requirements may include:	• access and equity principles and practice • confidentiality and security requirements • defined resource parameters • ethical standards • filing and documentation storage processes • goals, objectives, plans, systems and processes • legal and organisational policies, guidelines and requirements • OHS policies, procedures and programs • payment and delivery options • pricing and discount policies • quality and continuous improvement processes and standards • quality assurance and/or procedures manuals • replacement and refund policy and procedures • who is responsible for products or services
Product and service issues may include:	• customer delivery • faults • market share data • organisational product knowledge • production down-time • sales figures
Promotional activities may include:	• advertisements • client functions • employee functions • media announcements • product launches • web pages
Verifiable customer feedback sources may include:	• audit documentation and reports • complaints • customer satisfaction questionnaires • lapsed clients • quality assurance data

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RANGE STATEMENT	
	• returned goods • service calls

Unit Sector(s)

Unit sector	

Competency field

Competency field	Industry Capability - Product Skills and Advice

Co-requisite units

Co-requisite units		

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BSBPRO401A Develop product knowledge

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to develop product knowledge in preparation for the sales process.

Application of the Unit

This unit applies to individuals in a sales related position in a small, medium or large enterprise across a wide variety of industries and contexts who develop their product knowledge prior to undertaking selling activities. They may provide advice and support about aspects of sales solutions to support a sales team.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Acquire knowledge of products in a specified area	1.1. Identify ***information sources*** about ***products*** in a specified area and evaluate them for reliability and validity 1.2. Identify product purpose/s and use/s 1.3. Identify key ***features*** of the product/s 1.4. Identify product strengths and weaknesses 1.5. Articulate guarantees and warranties and identify service support details
2. Convert product knowledge into benefits	2.1. Identify features of the product which have potential buyer appeal 2.2. Present features of the product which have buyer appeal as benefits to the buyer 2.3. Present product benefits within the context of ***organisational requirements*** and legislation
3. Evaluate competitors' products	3.1. Use a range of information sources to identify competitors' products 3.2. Compare features, benefits, strengths and weaknesses of competitors' products with own products 3.3. Establish relative standing of the organisation's product with the competitors' product/s and communicate differences to the buyer

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

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Required skills
• information management skills to summarise information verbally and non-verbally • literacy and numeracy skills to interpret sales data and to summarise information obtained from a variety of verbal and non-verbal sources.
Required knowledge

• features, benefits, strengths and weaknesses of own organisation's and competitors' products
• industry competitors, trends and developments
• organisational structure/s, roles and responsibilities, policies, procedures, product labelling and descriptions
• potential buyer markets
• processes used when buying and selling products and services
• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • anti-discrimination
  • consumer protection
  • contract law legislation
• ethical principles
  • privacy laws
  • Trade Practices Act.

Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • comparison of the key features and benefits of product/s with competitor offerings • demonstration of product knowledge offered by an organisation • presentation of key features and benefits of own product/s.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated

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	environment • access to information sources about an organisation's and competitors' products, services or ideas • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentation of key features and benefits to customers or simulated customers • oral or written questioning to assess knowledge of features, benefits, strengths and weaknesses of organisation's and competitors' products • review of evaluation of identification of information sources about products in a specified area • evaluation of strengths and weaknesses established for competitors' products.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Information sources may include:	• associations • catalogues • claims of competitive sales people • competitor websites • competitor sales literature • external sales data sources such as warehouse withdrawals • internal sales data records • other company personnel • sales conventions • trade association magazines

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	• trade shows
Products may include:	• goods • ideas • services
Features may include:	• brand • colour • country of origin • covenant • manufacturer • product care details • safety aspect • shelf life • size • style • warnings
Organisational requirements may include:	• level of client service required • policies and procedures which are formally documented and are available for reference within the workplace

Unit Sector(s)

Business Development - Sales

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BSBPUB401A Develop and apply knowledge of public relations industry

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to research, analyse and apply knowledge of the various components of the public relations industry, including legal and ethical constraints and strategic communications management planning. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in entry level public relations positions who need to apply knowledge of the structure, organisation and functioning of the public relations industry in order to effectively conduct strategic communications.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Apply knowledge of the public relations industry	1.1. Seek information on the ***structure and operation*** of the public relations industry 1.2. Identify and access sources of information on the public relations industry 1.3. Obtain information on ***public relations industry sectors***, ***associations***, ***networks and societal role*** 1.4. Identify and access information on ***key stakeholders*** 1.5. Apply industry information appropriately in everyday activities related to typical work roles
2. Identify industry employment obligations and opportunities	2.1. Obtain information on employment obligations and opportunities in relation to the public relations industry 2.2. Apply information on employment opportunities and obligations in everyday activities related to typical work roles
3. Conduct strategic communications management planning	3.1. Establish purpose and processes for ***setting objectives*** in the workplace 3.2. Identify and apply appropriate ***planning and measurement tools*** to workplace objectives 3.3. Develop critical success factors for the

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ELEMENT	PERFORMANCE CRITERIA
	communications
4. Update industry knowledge	4.1. Conduct formal and informal research to update general knowledge of the industry continuously 4.2. Monitor current issues of concern to the industry 4.3. Share updated knowledge with client and colleagues 4.4. Incorporate updated knowledge into everyday activities related to typical work roles

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills such as questioning, active listening, clarifying and asking open questions
- culturally appropriate communication and interpersonal skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to read and interpret business and market data and write reports in a range of styles and for a range of audiences
- numeracy skills to analyse quantitative data
- research and evaluation skills to gather and record information about clients, organisations, target audiences, and the media
- technology skills to use a range of office equipment and information systems.

Required knowledge

- current issues and trends which affect the public relations industry
- overview knowledge of key provisions of relevant legislation from all levels of government, codes of practice and national standards that affect business operations such as:
  - anti-discrimination legislation and the principles of equal opportunity, equity, and diversity
  - copyright
  - defamation and libel
  - ethical principles
  - Australian Direct Marketing Association Limited (ADMA) Direct Marketing Code of Practice
  - FACTS (Federation of Australian Commercial Television Stations) codes

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REQUIRED SKILLS AND KNOWLEDGE
• privacy laws • TradePracticesAct1974 (Cth) • industry structures and networks • organisational and client operating environments, structures and business and marketing plans • principles and practices of marketing communications and media strategies.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • reporting on the public relations industry structure and its role in society and in a particular organisation • developing a stakeholder analysis relevant to a particularorganisation • reporting on the current issues affecting the public relations industry.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports about the public relations industry, structure, function and role in society • assessment of a stakeholder analysis conducted by the candidate • direct questioning with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations by the candidate about the public relations industry • oral or written questioning

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EVIDENCE GUIDE	
	• review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers • tests of knowledge on the structure and functioning of the public relations industry.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBPUB402A Develop public relations campaigns • BSBPUB403A Develop public relations documents • other marketing or public relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Structure and operation of the public relations industry may include:	• public relations practitioners in the following sectors:
	  • corporate
	  • government
	  • not-for-profit
	• public relations consultancies

Public relations industry sectors, ***associations***, ***networks and societal role*** may include:	• business associations • client networks • distribution channels • industry markets • industry relationships • local or regional characteristics • major industry bodies and associations • role and significance of an industry or sector
Key stakeholders may include:	• community groups • contractors

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RANGE STATEMENT	
	• general public • government departments • industry associations • investors • management • media • organisations • politicians • public service • staff • unions
Setting objectives may include:	• developing 'SMART' objectives • using key performance indicators
Planning and measurement tools may include:	• action plans • flow charts • four-step PR planning process • Gantt charts • key performance indicators • PERT • reviews of action plans • risk management plans • SMART objectives

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Public Relations

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Co-requisite units

Co-requisite units		

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BSBPUB402A Develop public relations campaigns

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and conduct a public relations campaign, to evaluate its effectiveness and to present the findings to stakeholders. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals in entry level or junior public relations roles who are required to develop public relations campaigns. As such they would undertake the majority of work in creating and implementing the campaign with advice from more senior public relations specialists in their organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Research public relations campaigns	1.1. Analyse strategic and operational plans to determine the scope, theme and objectives of a ***campaign***
	1.2. Conduct research into current practice and recent developments in relation to the campaign planning
	1.3. Identify ***the campaign's audience*** and their attributes
	1.4. Develop and present options to other members of the public relations team and relevant ***stakeholders*** for consideration
2. Prepare to implement public relations campaigns	2.1. Define and agree upon campaign objectives and ***campaign*** plan with client and other key ***stakeholders***
	2.2. Schedule and cost ***campaign*** accurately, and include in plans
	2.3. Comply with ***legal and ethical constraints***
	2.4. Confirm roles and responsibilities with other members of the public relations team
3. Implement public relations campaigns	3.1. Implement public relations ***campaign*** in accordance with the plan
	3.2. Evaluate the potential effectiveness of and use appropriate ***media*** to improve campaign publicity
	3.3. Implement campaign in accordance with ***legal and ethical constraints*** and organisational requirements

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Monitor campaign progress against scheduling and costing requirements and report likely variations for approval in accordance with organisational procedures 3.5. Gain agreement from stakeholders to any changes that need to be made to campaign
4. Review and evaluate public relations programs	4.1. Ensure campaign plans contain methods to monitor, review and evaluate their effectiveness 4.2. Report on the outcomes of the campaign to relevant internal and/or external stakeholders 4.3. Consult relevant internal or external stakeholders as to the campaign effectiveness, and document any recommended improvements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication, interpersonal and negotiation skills to run public relations campaigns effectively
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to read and interpret a range of complex material and write reports and strategic materials in a range of styles
- numeracy skills to cost relevant items such as use of media and printing schedules
- organisational and time-management skills to organise workload and write, print and distribute public relations material within required timelines
- presentation skills to convey a professional image in all communications
- research skills to obtain necessary background information about clients, campaign objectives and issues affecting public relations campaigns
- technology skills to use a range of office equipment and software to produce high quality public relations materials and presentations.

Required knowledge

- current issues/trends which affect the public relations industry
- computer software applications
- overview knowledge of key provisions of relevant legislation from all levels of

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REQUIRED SKILLS AND KNOWLEDGE
government, codes of practice and national standards that affect business operations such as: • anti-discrimination legislation and principles of equal opportunity, equity, and diversity n • copyright • defamation and libel laws • ethical principles such as those outlined in the Public Relations Institute of Australia CodeofEthics and the Australian Journalists Association CodeofEthics • marketing codes of practice and codes of conduct such as the Australian Direct Marketing Association (ADMA) Code of Practice • privacy laws • sweepstakes regulations • TradePracticesAct1974(Cth) • industry structures and networks • organisational and client operating environments, structures and business and marketing plans • principles, practices and theories of marketing, media, public relations and project management.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing and reporting or presenting on a public relations campaign for a target public about a product or service.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated work environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess

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EVIDENCE GUIDE	
	practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on a public relations campaign • assessment of examples of promotional materials developed for the public relations campaign • demonstration of capacity to implement a public relations campaign in a workplace • direct questioning with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations prior to, during and after campaign completion • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other marketing or public relations units

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Campaigns may include:	• anniversaries of opening • campaigns to improve organisational image • centenary events • graduation ceremonies • milestone customer numbers • opening ceremonies

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RANGE STATEMENT	
	• organisational communication activities • product launches • season launches
The campaign's audience may include:	• customers • employees • government • managers • specified target public group • the media
Stakeholders may include:	• personnel internal to an organisation • clients of an organisation • community groups • contractors • general public • government departments • industry associations • investors • management • media • organisations • politicians • public service • staff • unions

Legal and ethical constraints may include:	• codes of practice
	• cultural expectations and influences
	• ethical principles
	• relevant legislation
	• policies and guidelines
	• regulations
	• social responsibilities such as:
	  • protection of children
	  • environmental issues
	• societal expectations

Media may include:	• direct mail • external promotional material • internal communication materials • press • promotional material

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RANGE STATEMENT	
	• radio • television • the Internet

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Public Relations

Co-requisite units

Co-requisite units		

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BSBPUB403A Develop public relations documents

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to design, produce and edit public relations documents for various target audiences, and to evaluate their effectiveness in the marketplace. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in public relations roles who are required to develop various marketing communication documents. Typically they would do this as part of a team working on a public relations campaign.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Research appropriate public relations documents	1.1. Research ***previous communication documents*** for tone, content and style 1.2. Research previous ***communication media*** and media distribution channels using ***appropriate methods*** 1.3. Research and analyse existing evaluation data 1.4. Conduct research about ***target public***, clients or relevant organisations
2. Plan production of communication document	2.1. Identify and segment the ***target public*** 2.2. Identify and agree upon communication objectives, messages and processes with other team members or supervisors in accordance with organisational procedures 2.3. Ensure communication message is related to organisational strategic objectives and operational plans 2.4. Identify and gain agreement on appropriate ***communication media*** and media channels to send communication message 2.5. Identify and agree upon processes to test the success of planned public relations communications 2.6. Determine outsourcing resources, and provide input into developing timelines and costs

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ELEMENT	PERFORMANCE CRITERIA
	2.7. Identify ***legal and ethical constraints*** impacting on communication message
3. Create and edit public relations documents	3.1. Design and write ***communication*** documents in accordance with organisational objectives which effectively communicate issues, policies and practices of the organisation to target audiences 3.2. Scan documents to ensure compliance with ***legal and ethical requirements*** and proofread to identify and correct errors 3.3. Assess appropriateness of the style and tone of text for the ***target public*** and carry out structural ***editing*** to ensure the document flows logically 3.4. ***Edit*** the document to ensure its scope and format is in accordance with the organisation's strategic communications plan and complies with house style 3.5. Seek feedback from ***appropriate personnel*** on content of public relations documents following proofreading 3.6. Test document and amend it in response to feedback 3.7. Determine and agree upon modifications and incorporate into final draft
4. Implement and evaluate public relations documents	4.1. Forward any required document to outsourced resources within scheduled timelines 4.2. Distribute document in accordance with scheduled timelines using appropriate public relations publications to communicate and promote the goals of the organisation 4.3. Gather feedback and regularly monitor the effectiveness of distributed documents using ***appropriate evaluation methods*** 4.4. Evaluate results of public relations documents against communication, organisational or client objectives 4.5. Record and file evaluation results and any improvement recommendations for future reference

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- information management skills to retrieve, record and store public relations documents
- literacy skills sufficient to write public relations documents in a range of styles and tones for a range of target publics and audiences
- organisational and time-management skills to sequence tasks and meet timelines
- research and data collection skills to analyse previous communication documents and to identify relevant information relating to the client, target public, audience and organisation
- technology skills to use a range of office equipment such as computers and software such as word processing.

Required knowledge

- current issues or trends which affect the public relations industry
- overview knowledge of key provisions of relevant legislation from all levels of government, codes of practice and national standards that affect business operations, such as:
  - anti-discrimination legislation and principles of equal opportunity, equity and diversity
  - copyright
  - defamation and libel laws
  - ethical principles such as those outlined in the Public Relations Institute of Australia Code of Ethics and the Australian Journalists Association Code of Ethics
  - marketing codes of practice and conduct such as the Australian Direct Marketing Association (ADMA) Code of Practice
  - privacy laws
  - TradePracticesAct1974 (Cth)
- industry structures, networks within the public relations industry
- organisational and client operating environments, structures and business and marketing plans
- principles and practices of marketing communications and media strategies.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • researching, designing, developing, testing, implementing and evaluating a range of public relations documents intended to communicate different concepts to for different audiences.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of examples of public relation documents • demonstration of document testing techniques • direct questioning with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBPUB402ADevelop public relations campaigns • other marketing or public relations units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different

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RANGE STATEMENT	
work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Previous communication documents may include:	• annual reports • brochures • community service announcement scripts for radio or television • direct mail letters • flyers • media releases • newsletters • position papers • press kits • speeches • organisational, marketing and public relations strategic plans
Communication media may include:	• biographical sketches • brochures • direct mail letters • fact sheets • flyers • media releases • position papers • speeches
Appropriate methods may include:	• content analysis • focus groups • interviews • secondary resource information • surveys
Target public, as the audience for the communication, may include:	• community groups • contractors • general public • government departments • industry associations • investors • management • media • organisations

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RANGE STATEMENT	
	• politicians • public service • staff • unions

Legal and ethical constraints may include:	• codes of practice, codes of ethics
	• cultural expectations and influences
	• ethical principles
	• relevant legislation
	• policies and guidelines
	• regulations
	• social responsibilities such as:
	  • protection of children
	  • environmental issues
	• societal expectations

Editing may include:	• checking for consistency with house style • detailed editing to ensure material expresses author's meaning clearly without gaps of contradictions • substantive editing to improve the overall presentation of material through rewriting and rearranging material
Appropriate personnel may include:	• clients • team members and colleagues • managers • senior managers • supervisors • test groups
Appropriate evaluation methods may include:	• content analysis • focus groups • surveys

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Business Development - Public Relations

Co-requisite units

Co-requisite units		

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BSBPUB501A Manage the public relations publication process

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage the design, production, implementation and evaluation of public relations publications in accordance with organisational requirements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a public relations role who are responsible for managing publication of public relations documents for a campaign. They may either manage the publication process independently or coordinate the activities of people working under their supervision.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Research publication requirements and segment target audience	1.1. Prepare a public relations research brief that specifies the research objectives, methodology, time schedule and budget 1.2. Consider the ***internal and external factors*** that may impact the effectiveness of public relations publication 1.3. Assess ***primary*** and ***secondary research methods*** for their capacity to provide information on publications requirements and market segments 1.4. Evaluate and choose ***criteria*** to use in segmenting the audience in accordance with the public relations brief 1.5. Define the target audience in terms of prospective readers of the publications 1.6. Ensure the target audience profile meets organisational requirements in terms of level and style of language usage, format, content and level of detail
2. Plan public relations publications	2.1. Ensure ***publication purpose*** is consistent with organisational mission, vision and corporate values 2.2. Identify, agree upon and document publication

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ELEMENT	PERFORMANCE CRITERIA
	objectives and central message consistent with messages in other organisational publications 2.3. Select team members according to skill and knowledge requirements 2.4. Develop and agree upon budgets and schedules with relevant stakeholders 2.5. Identify appropriate ***suppliers*** of goods and services and obtain quotations as required 2.6. Develop criteria to test and evaluate the success of the publication
3. Develop and evaluate public relations publications	3.1. Design and write publication text in accordance with communication objectives and house style 3.2. Check readability of material to ensure it is geared to the target audience's reading levels 3.3. Test document with relevant stakeholders and incorporate findings into the final publication 3.4. Ensure publications, including any changes, comply with ***legal and ethical requirements*** 3.5. Select and contract suppliers to complete publication production processes 3.6. Distribute publication according to public relations plan 3.7. Evaluate ***aspects*** of the publication in line with stakeholder feedback and against evaluation criteria

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication and negotiation skills to relate to people from diverse backgrounds and people with diverse abilities, to liaise effectively with team members and consult with external suppliers
- literacy skills to write a range of documents containing complex ideas in a readable and engaging style appropriate to suit a range of audiences
- organisational, project management and time management skills to ensure publications are ready and distributed on time
- research and evaluation skills to segment and profile target audiences of public

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REQUIRED SKILLS AND KNOWLEDGE
relations communications • technology skills to use a range of office equipment and software applications.
Required knowledge

• overview knowledge of key provisions of relevant legislation from all levels of government, codes of practice and national standards that affect business operations, such as:
  • anti-discrimination legislation and the principles of equal opportunity, equity and diversity
  • copyright
  • defamation and libel
  • ethical principles such as those outlined in the Public Relations Institute of Australia Code of Ethics and the Australian Journalists Association Code of Ethics
  • marketing codes of practice and conduct such as the Australian Direct Marketing Association Limited (ADMA) Direct Marketing Code of Practice
  • privacy laws
  • TradePracticesAct1974 (Cth)
• principles and practices of the media and printing industries.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing and implementing at least one complex public relations publication in accordance with the publication deadline.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • access to examples of previous related public relations documents.
Method of assessment	A range of assessment methods should be used to assess

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EVIDENCE GUIDE	
	practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on public relations publication • assessment of examples of publications developed • demonstration of how the techniques used to manage a team and external suppliers • direct questioning with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations prior to, during and after completion of publication process • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBPUB502A Develop and manage complex public relations campaigns • BSBPUB503A Manage fundraising and sponsorship activities • marketing units • advertising media units • other public relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Internal factors may include:	• organisational communication history • organisational policies

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RANGE STATEMENT	
	• organisational procedures • perceptions and actions of key internal stakeholders
External factors may include:	• community expectations • external stakeholder perceptions • legislative requirements • prevailing social and economic trends
Primary research methods may include:	• interviews • observation • questionnaires • SWOT analysis
Secondary research methods may include:	• annual reports • customer complaints records • employee complaints records • newsletters • personal contacts • sales reports
Criteria may include:	• attitudes • demographics • psychographics • sociography • values
Publication purpose may include:	• communicating a message to a target audience • differentiating organisational features • promoting business policies • promoting the image • providing information
Suppliers may include:	• contractors • external editors • media companies • printers • promotion agencies • publishers • web designers
Legal and ethical requirements may include:	• community standards • cultural expectations and influences • ethical principles • industry codes of conduct • legislation

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RANGE STATEMENT	
	• regulations • society's expectations
Aspects may include:	• appeal • credibility • impact • capacity to arouse interest • language style • message clarity

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Public Relations

Co-requisite units

Co-requisite units		

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BSBPUB502A Develop and manage complex public relations campaigns

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop complex and potentially on-going public relations campaigns. It builds upon the skills and knowledge acquired in the unit BSBPUB402A Develop public relations campaigns.No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in senior public relations roles who are primarily responsible for the development, implementation and evaluation of a complex public relations plan. The complexity of the campaign may be in terms of its size or duration, or the circumstances surrounding the campaign. This unit is related to BSBPUB402A Develop public relations campaigns, which relates to entry level or junior public relations roles, for example to individuals working on less complex campaigns in team leader roles.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Interpret a complex public relations campaign brief	1.1. Identify the primary objective of a ***complex public relations campaign*** brief 1.2. Identify the campaign's messages, strategies, roles and responsibilities, resource requirements including budget and timing and evaluation measures 1.3. Identify ***legal and ethical constraints*** in relation to the brief
2. Identify and evaluate options for a complex public relations campaign	2.1. Analyse ***information about the target public*** and their attributes, and the public relations environment 2.2. Identify and evaluate a range of options for message concepts using ***appropriate methods*** 2.3. Identify, access and select ***media vehicles*** appropriate to target the required public and the objectives of the campaign

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ELEMENT	PERFORMANCE CRITERIA
	2.4. Ensure selected ***media vehicles*** enable reach and frequency requirements to be met within budget 2.5. Consult ***media directories*** to ensure that enlisted journalists and any other personnel are the most appropriate for the campaign 2.6. Ensure selected ***media vehicles*** meet ***media operational requirements*** 2.7. Ensure selected ***media vehicles*** meet ***legal and ethical requirements*** 2.8. Identify requirements for external suppliers and engage or contract these resources where required
3. Prepare public relations campaign plans	3.1. Scope, plan and document a ***complex public relations campaign*** and its approach to suit the requirements of the client 3.2. Seek quotations from suppliers for materials and evaluate against budgetary requirements or constraints 3.3. Determine and agree upon budget 3.4. Determine and agree upon timing and schedules 3.5. Identify potential sources of risk and develop and document appropriate control mechanisms 3.6. Produce plans on time 3.7. Finalise plan and ensure it complies with organisational, client, professional and legal requirements
4. Implement public relations campaign plans	4.1. Implement and regularly monitor public relations plan 4.2. Identify, agree upon and implement any changes to the plan 4.3. Complete planning and implementation activities on time

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication and negotiation skills to relate to people

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REQUIRED SKILLS AND KNOWLEDGE
from diverse backgrounds and people with diverse abilities, to liaise effectively with team members and consult with external suppliers • literacy skills to write a range of documents containing complex ideas in a readable, persuasive and engaging style appropriate to suit a range of audiences • organisational, project management and time management skills to ensure publications are ready and distributed on time • research and evaluation skills to obtain, analyse and synthesise information, segment and profile target audiences of public relations communications • technology skills to use a range of office equipment and software applications.
Required knowledge

• overview knowledge of key provisions of relevant legislation from all levels of government, codes of practice and national standards that affect business operations such as:
  • anti-discrimination legislation and principles of equal opportunity, equity and diversity
  • copyright
  • defamation and libel laws
  • ethical principles such as those outlined in the Public Relations Institute of Australia CodeofEthics and the Australian Journalists Association CodeofEthics
  • marketing codes of practice and conduct such as the Australian Direct Marketing Association Limited (ADMA) Direct Marketing Code of Practice
  • privacy laws
  • sweepstakes regulations
  • TradePracticesAct1974 (Cth)
• organisational policies, procedures, products, services and structure
• principles and practices in relation to the media and the public relations and printing industries
• teamwork and project management skills to effectively develop and manage a complex public relations project.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• developing and effectively managing a complex public relations campaign, including:
	  • preparing campaign plan containing objectives of the campaign, a risk assessment, strategies, scheduling, budgetary and resource requirements
	  • engaging external suppliers where appropriate
	  • evaluating the success of campaign.

Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of previous public relations communication documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on complex public relations campaign activities • assessment of examples of publications developed • demonstration of how the techniques used to manage a team and external suppliers • direct questioning with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations prior to, during and after campaign completion • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBADV511A Evaluate and recommend advertising media options • BSBPUB501A Manage the public relations

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EVIDENCE GUIDE	
	publication process • BSBPUB503A Manage fundraising and sponsorship activities • marketing and advertising units • other public relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
A complex public relations campaign includes complexity in terms of its scope, scheduling, budgetary or resource requirements, for example in relation to:	• anniversaries of opening • centenary events • graduation ceremonies • improving organisational image • milestone customer numbers • opening ceremonies • organisational communication activities • product launches • season launches

Legal and ethical constraints may include:	• codes of practice
	• cultural expectations and influences
	• ethical principles
	• relevant legislation
	• policies and guidelines
	• regulations
	• social responsibilities such as:
	  • protection of children
	  • environmental issues
	• societal expectations

Information about target public may include:	• attitudes • demographic variables • lifestyle • psycho graphical variables

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RANGE STATEMENT	
	• social and cultural factors • values
Appropriate methods may include:	• focus groups • interviews • questionnaires • reports
Media vehicles may include:	• advertising • brochures • direct mail • direct marketing • leaflets • newsletters • press releases • reports • trade shows • video clips

Media directories may include:	• in-house designed media directory
	• commercial media lists such as:
	  • Margaret Gee's Australian Media Guide
	  • Directory of Australian Associations
	  • Marketing Navigator

Media operational requirements may include:	• journalist contact details • media deadlines • media personnel and their rounds • printing industry requirements • story lead times

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Public Relations

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Co-requisite units

Co-requisite units		

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BSBPUB503A Manage fundraising and sponsorship activities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to conduct and manage fundraising and sponsorship activities for a not-for-profit organisation, and to align fundraising and sponsorship activities with organisational requirements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to senior public relations professionals who manage public relations in the not-for-profit sectorthey usually coordinate activities of team members in developing funding submissions or allocating budgets, and implement specific public relations activities.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify factors influencing fundraising or sponsorship	1.1. Identify relevant environmental issues in relation to fundraising and sponsorship 1.2. Identify available sources of ***funding or sponsorship*** including criteria for, and any conditions or constraints on, funding 1.3. Conduct research to identify the most appropriate target public for fundraising or sponsorship activities in accordance with organisational profile and requirements 1.4. Identify and consider ***legal and ethical requirements*** in relation to fundraising or sponsorship 1.5. Make recommendations for fundraising or sponsorship campaigns or activities based on research findings
2. Prepare a funding submission	2.1. Evaluate organisation's current operations and readiness to apply for ***funding*** 2.2. Develop a ***funding*** submission which meets the funding source's guidelines and criteria 2.3. Ensure the submission complies with all ***legal and ethical requirements*** 2.4. Write the submission to meet the needs of the grantor and submitting organisation

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ELEMENT	PERFORMANCE CRITERIA
3. Develop a fundraising or sponsorship campaign	3.1. Confirm the aims, objectives, outcomes and evaluation measures for a ***fundraising or sponsorship campaign*** with senior management 3.2. Conduct a feasibility study to ensure all aspects of the ***fundraising or sponsorship campaign*** have been considered 3.3. Examine and agree upon budgets with senior management 3.4. Prepare, and have agreed, a campaign plan for fundraising or sponsorship activities that meets organisational, ethical and legal requirements
4. Implement a fundraising or sponsorship campaign	4.1. Conduct a ***fundraising or sponsorship campaign*** in accordance with plan 4.2. Monitor progress of campaign and make necessary alterations as required 4.3. Ensure any changes are agreed upon by ***relevant stakeholders*** 4.4. Ensure changes meet ***legal and ethical requirements***
5. Evaluate campaign	5.1. Evaluate campaign outcomes against outcomes documented in campaign plan 5.2. Obtain feedback on performance of ***fundraising or sponsorship campaign*** from stakeholders 5.3. Develop mechanisms to incorporate feedback into any future fundraising campaigns

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • interpersonal skills to work with a variety of stakeholder such as employees, team members, senior management, volunteers and other external stakeholders and manage conflict effectively • literacy skills to write and make presentations for funding or sponsorship submissions • organisational, time-management, problem-solving and project management skills

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REQUIRED SKILLS AND KNOWLEDGE
to simultaneously manage multiple project activities • research and data collection skills to evaluate donor and sponsorship environment.
Required knowledge

• computer software applications
• overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • anti-discrimination legislation and principles of equal opportunity, equity and diversity
  • copyright
  • defamation and libel
  • ethical principles such as those outlined in the Public Relations Institute of Australia CodeofEthics and the Australian Journalists Association CodeofEthics
  • marketing codes of practice and conduct such as the Australian Direct Marketing Association Limited (ADMA) Direct Marketing Code of Practice
  • privacy laws
  • sweepstakes regulations
  • Trade Practices Act 1974 (Cth)
• organisational culture, policies, procedures and operating environment
• principles and practices of fundraising, donor motivation and fundraising alternatives
• principles and practices in relation to the media industry.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing and successful executing and evaluating a fundraising or sponsorship campaign.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated work

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EVIDENCE GUIDE	
	environment • access to office equipment and resources • access to examples of public relations documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on campaign activities • examples of promotional or media activities undertaken as part of fundraising or sponsorship campaigns • direct questioning with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBPUB501AManage the public relations publication process • BSBPUB502ADevelop and manage complex public relations campaigns.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Funding or sponsorship may	• corporate sponsorships and partnerships

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RANGE STATEMENT	
include:	• government grants • non-government grants • private trust and foundations
Legal and ethical requirements may include:	• community standards • cultural expectations and influences • ethical principles • industry codes of conduct • legislation • regulations • society's expectations
Fundraising or sponsorship campaign may include:	• alumni • annual campaigns • bequests • capital campaigns • cause related marketing • direct mail campaigns • doorknocks • gaming • major gift giving • memberships • merchandising and income earned ventures • planned giving • special events • street appeals
Relevant stakeholders may include:	• community groups • contractors • general public • government departments • industry associations • investors • management • media • organisations • politicians • public service • staff • sponsorship organisation representatives • unions

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Public Relations

Co-requisite units

Co-requisite units		

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BSBPUB504A Develop and implement crisis management plans

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required by public relations personnel to coordinate, develop and implement a crisis management plan to provide an organisation with a planned communications response for use in the event of crisis. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in senior public relations roles who are primarily responsible for preparing and implementing a planned communications response in the event of a crisis occurring.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop crisis management plans	1.1. Conduct ***research*** to identify ***crisis management*** best practice 1.2. Consult ***relevant groups and individuals*** for input into the ***crisis management plan*** 1.3. Document, distribute and maintain organisational ***crisis management plan*** 1.4. Ensure organisational ***crisis management plan is*** clearly understood by relevant groups 1.5. Ensure ***crisis management plan*** complies with organisational policies and ***legal and ethical requirements*** 1.6. Practise simulated crisis responses
2. Implement a crisis management plan	2.1. Set up a dedicated crisis resource centre 2.2. Develop a crisis response team to ***deal with media*** and conduct issue tracking 2.3. Monitor media to ensure the organisation is aware of possible crises 2.4. Implement and monitor ***issues tracking*** systems according to crisis plans
3. Review and update crisis management plans	3.1. Consult managers and employees about the effectiveness of the crisis plan 3.2. Amend crisis management plans as necessary to comply with legal and ethical requirements

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication, interpersonal and negotiation skills to liaise effectively with stakeholders, resolve conflict and develop effectives crisis management plans
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills sufficient to write to a range of audiences in different styles
- research and data collection skills to design and analyse crisis management plans
- technology skills to use a range of software and equipment relevant to the public relations industry

Required knowledge

- computer software applications
- overview knowledge of key provisions of relevant legislation from all levels of government, codes of practice and national standards that affect business operations such as:
  - anti-discrimination legislation and principles of equal opportunity, equity and diversity
  - copyright
  - defamation and libel laws
  - ethical principles such as those outlined in the Public Relations Institute of Australia CodeofEthics and the Australian Journalists Association CodeofEthics
  - marketing codes of practice and conduct such as the Australian Direct Marketing Association Limited (ADMA) Direct Marketing Code of Practice
  - privacy laws
  - TradePracticesAct1974(Cth)
- organisational culture, policies, procedures and operating environment
- principles of crisis and media management
- principles and practices in relation to the media and public relations

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing, reporting on and presenting a crisis management plan • implementing and evaluating a crisis management plan
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of previous crisis management planning and evaluation documents
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written crisis management plans or reports of crisis management activities • demonstration of crisis management techniques in a workplace or simulated environment • direct questioning with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations in relation to crisis management planning and implementation • oral or written questioning • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers
Guidance information for assessment	• Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example other marketing units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Research may include:	• analysis of previous organisational crisis management plans and their effectiveness • attendance at crisis management training courses • analysis of crisis management plans in other organisations • evaluation of case studies
Crisis management may include:	• any negative publicity that may affect the success of the business
Relevant groups and individuals may include:	• consumer protection groups • customers • employees • management • media spokespersons • safety representatives • statutory bodies
Crisis management plan may include:	• crisis manuals • details of media contact directories • developing a dedicated crisis resource centre • simulated crisis policies and procedures • stipulated crisis management triggers
Legal and ethical requirements may include:	• community standards • cultural expectations and influences • ethical principles • industry codes of conduct • legislation • regulations • society's expectations
Deal with media may include:	• arranging for the production of video news clips • organising media conferences • organising media interviews for organisational spokesperson

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RANGE STATEMENT	
Issues tracking may include:	• monitoring media • researching issues of concern for the organisation • considering implications for the organisation

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Public Relations

Co-requisite units

Co-requisite units		

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BSBPUR301B Purchase goods and services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit specifies the outcomes required to determine purchasing requirements, and make and receive purchases. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who conduct low risk, low expenditure purchasing for an organisation using established and documented purchasing strategies. The unit may be undertaken by someone working in a small organisation who has general responsibility for conducting purchasing within an organisation, or by a purchasing specialist working in a large organisation. Some judgement may be required to make decisions in the implementation of purchasing strategies and work is generally conducted under the supervision of others.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Understand purchasing and own requirements	1.1. Read, understand and clarify organisation's ***purchasing strategies*** as required 1.2. Determine own role and ***limits*** of authority in consultation with ***relevant personnel***
2. Make purchases	2.1. Receive purchase specifications from relevant personnel and clarify as required 2.2. Select ***purchasing methods*** most appropriate to particular purchases within limits of own role 2.3. Obtain approvals for purchases as required 2.4. Obtain quotations from suppliers as required 2.5. Select suppliers, place orders and make purchases
3. Receive purchases	3.1. Receive goods or make arrangements to receive services 3.2. Advise relevant personnel of receipt of purchase 3.3. Ensure goods received are checked for compliance with specifications 3.4. Take action to resolve non-compliance with specifications 3.5. Facilitate registration of new assets 3.6. File and store ***purchase records***

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- communication skills to liaise with suppliers and end users of purchases
- literacy skills to document purchases and write reports on purchasing activities
- information management and research skills to analyse and assess purchasing options and offers
- technology skills to use of software to keep records of purchases made
- data collection skills to keep records related to purchasing.

Required knowledge

- codes of ethics and conduct
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - consumer protection legislation
  - contract law
  - import of goods and services, where relevant
  - sale of goods legislation
  - Trade Practices Act
- organisation policy and procedures relating to:
  - purchasing strategies
  - record-keeping systems related to purchasing and assets
  - standard contracting arrangements
- product knowledge about the goods and services being supplied
- purchasing and procurement principles for:
  - accountability
  - probity and transparency
  - risk management
  - value for money.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • obtaining quotes from prospective suppliers for a low risk, low expenditure good to be purchased • selection of appropriate purchasing methods for a low risk, low expenditure purchase • receipt, checking and documentation of a low risk, low expenditure purchase.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • organisation's purchasing strategies and relevant purchasing records.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports documenting purchasing requirements and records of purchases made • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of obtaining quotes form suppliers • oral or written questioning to assess knowledge • review testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other purchasing units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Purchasing strategies may include:	• criteria for making purchasing decisions • legal requirements and policies and procedures that underpin strategies and that are relevant to role • policies, procedures, guidelines and documentation formats for purchasing from suppliers including entities owned by the organisation, partners, alliance members and local and distant suppliers
Limits may include:	• approval processes for purchases • expenditure approval limits
Relevant personnel may include:	• CEOs • managers • leaders • coordinators • supervisors • other persons authorised to commit the organisation to purchases • internal users of purchased goods and services • owner • Board members • specialist personnel involved in purchasing, asset maintenance and finance
Purchasing methods may include:	• credit card purchases • direct purchases from retail outlets • online purchases • petty cash • purchases using standing agreements or accounts with suppliers • written and/or verbal quotations • written and/or verbal supply agreements
Purchase records may include:	• corporate credit card transaction documentation

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RANGE STATEMENT	
	• invoices, statements and payment requests • petty cash vouchers • purchase requests and orders • receipt advices for goods and services • records of supplier performance

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Purchasing and Contracting

Co-requisite units

Co-requisite units		

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BSBPUR401B Plan purchasing

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to prepare invitations to offer, identify suppliers, issue invitations to offer, and prepare purchase recommendations. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are required to prepare for complex purchasing agreements up to and including the point at which the organisation selects, without prejudice, a supplier. This is done with strict adherence to legal requirements and the organisation's purchasing strategies, and traditionally by a purchasing officer working under supervision of a purchasing manager or in consultation with senior management. The purchasing role addressed in this unit involves significant risk and/or significant expenditure and detailed legal and documentation arrangements.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Prepare invitations to offer	1.1. Obtain specifications for goods and services to be purchased from ***relevant personnel*** and clarify as required 1.2. Select ***purchasing methods*** most appropriate to particular purchases 1.3. Prepare ***invitations to offer*** 1.4. Obtain approval of invitations to offer
2. Identify suppliers	2.1. Review organisation's records for potential suppliers 2.2. Identify sources of supply 2.3. Invite suppliers 2.4. Evaluate sources of supply against requirements of ***purchasing strategies***
3. Issue invitations to	3.1. Distribute invitations to offer

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ELEMENT	PERFORMANCE CRITERIA
offer	3.2. Conduct briefings as required 3.3. ***Clarify issues*** arising with suppliers in line with purchasing strategies
4. Prepare recommendations to purchase	4.1. Receive offer documents from suppliers 4.2. Assess offer documents against requirements of purchasing strategies 4.3. Seek ***further information*** from suppliers as required 4.4. Obtain specialist expertise to assist with evaluation as required 4.5. Evaluate offers against requirements of purchasing strategies 4.6. Prepare shortlists of suppliers that make offers and who meet purchasing criteria 4.7. Select preferred offers 4.8. Make recommendations about preferred offers and seek approval by relevant personnel 4.9. Obtain approval for recommended offers

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to negotiate and liaise with potential suppliers and relevant personnel involved in purchasing planning
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- information technology skills to use software relevant to conducting purchasing planning activity
- information management skills to ensure all aspects of purchasing planning are conducted in sufficient detail
- literacy skills to write tender or quotation documents and written reports containing complex concepts
- organisational and time management skills to sequence tasks and meet timelines.

Required knowledge

- identification and overview knowledge of key provisions of relevant legislation

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REQUIRED SKILLS AND KNOWLEDGE
from all levels of government that affects business operations, codes of practice and national standards, such as: • consumer protection legislation • contract law • import of goods and services, where relevant • sale of goods legislation • Trade Practices Act • organisational practices, policies and procedures for purchasing • product knowledge about the goods and services being supplied • purchasing and procurement principles for: • accountability • probity and transparency • risk management • value for money.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documents containing preparations to offer • evaluation of suppliers • issuing of an invitation to offer • formation of recommendation to purchase.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • organisation's purchasing strategies and relevant purchasing records.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples

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EVIDENCE GUIDE	
	are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports documenting the procurement planing process • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of preparation and issuing of invitations to offer • oral or written questioning to assess knowledge • review testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other purchasing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant personnel may include:	• CEO • coordinators • internal users of purchased goods and services • leaders • managers • other persons authorised to commit the organisation to purchases • owner and Board • specialist personnel involved in purchasing, asset maintenance and finance • supervisors
Purchasing methods may	• direct negotiations

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RANGE STATEMENT	
include:	• direct purchases using supply agreements • electronic trading • invitation of open or select tenders • written quotations
Invitations to offer may include:	• criteria for selection of suppliers from offers received • delivery schedules • draft contracts and agreements • quality requirements • required supplier capacity • requirements for off-site storage and warehousing • specifications of goods and/or services required

Purchasing strategies may include:	• criteria for evaluating purchasing performance
	• different policies, procedures and strategies for different dollar values of purchases
	• limits of authority to approve purchases
	• methodology for evaluating purchasing performance
	• organisational and industry codes of conduct and ethics
	• requirements for fairness and transparency in purchasing
	• the organisation's documented strategies for things such as:
	  • purchasing
	  • covering policies
	  • procedures, guidelines and documentation formats for purchasing from suppliers including entities owned by the organisation, partners, alliance members and local and distant suppliers

Clarify issues may include:	• requests for further information about specifications not responded to, misinterpretations of specifications and supplementary/add on products or services
Further information may include:	• requests about specifications not responded to, misinterpretations of specifications and supplementary/add on products or services • supplier briefings and presentations

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Purchasing and Contracting

Co-requisite units

Co-requisite units		

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BSBPUR402B Negotiate contracts

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit specifies the outcomes required to negotiate terms of contracts with suppliers, and prepare and finalise contracts. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who negotiate and formalise complex purchasing arrangements involving significant risk and/or significant expenditure and detailed legal and documentation arrangements. This unit applies to individuals who negotiate contracts as part of a broad purchasing role but are not specialist legal practitioners. They are typically guided by organisational contract negotiation guidelines and work under minimal supervision of a senior purchasing manager or in consultation with senior management.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Negotiate terms of contracts with suppliers	1.1. Offer advice and undertake negotiations without prejudice 1.2. Advise suppliers of the organisation's intent to accept their offers 1.3. Negotiate ***issues*** with suppliers 1.4. Determine desired outcomes, negotiation plans and schedules for negotiations 1.5. Undertake negotiations and reach agreements with suppliers in accordance with plans 1.6. Negotiate and document contract requirements to the satisfaction of the organisation and suppliers
2. Prepare contracts	2.1. Draft required ***contracts*** using legal expertise if required 2.2. Distribute draft contracts to ***relevant personnel*** and suppliers 2.3. Ensure any discrepancies or disagreements are

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ELEMENT	PERFORMANCE CRITERIA
	clarified and resolved to the satisfaction of all parties 2.4. Ensure ***checks*** of the legality and validity of draft contracts are made 2.5. Obtain approvals to sign contracts
3. Finalise contracts	3.1. Ensure contracts are signed and exchanged between the organisation and suppliers 3.2. Ensure contracts and related documents are stored and safeguarded 3.3. Advise relevant personnel of contract requirements 3.4. Advise unsuccessful suppliers of non-acceptance of offers

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- communication and negotiation skills to liaise with suppliers and reach agreement with suppliers on contracts
- literacy skills to draft concepts and write reports containing complex concepts
- technology application skills to use a range of software programs relevant to purchasing and contracting.

Required knowledge

- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - consumer protection legislation
  - contract law
  - import of goods and services, where relevant
  - sale of goods legislation
  - Trade Practices Act
- organisational practices, policies and procedures for purchasing
- product knowledge about the goods and services being supplied
- purchasing and procurement principles for:

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REQUIRED SKILLS AND KNOWLEDGE
• accountability • probity and transparency • risk management • value for money.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documented agreement of terms with suppliers • drafting and completion of a contract with a supplier for goods and services • informing of successful and unsuccessful suppliers.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • organisation's purchasing strategies and relevant purchasing records.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of draft and finalised contracts for the supply of goods and services • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of contacting successful and unsuccessful suppliers about the awarding of the contract • oral or written questioning to assess knowledge

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EVIDENCE GUIDE	
	• review testimony from team members, colleagues, supervisors or managers • review of authenticated documents from the workplace or training environment.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other purchasing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Issues may include:	• issues relating to non-compliance with invitation to offer requirements • issues relating to occupational health and safety (OHS) performance standards • issues relating to the form and specific requirements of contract documentation
Contracts may include:	• agreements for one-off or ongoing supply of goods or services • agreements with Australian or overseas individuals, contractors, corporations, individuals and government agencies • electronic or paper-based agreements • memoranda of understanding/agreement
Relevant personnel may include:	• CEO • managers • leaders • coordinators • OHS specialists • supervisors • other persons authorised to commit the

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RANGE STATEMENT	
	organisation to purchases • internal users of purchased goods and services • owner • Board • specialist personnel involved in purchasing, asset maintenance and finance

Checks may include:	• referring the contract to others such as:
	  • external legal representative for organisation
	  • legal officer within organisation
	  • purchasing manager

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Purchasing and Contracting

Co-requisite units

Co-requisite units		

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BSBPUR403B Conduct international purchasing

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit specifies the outcomes required to conduct international purchasing and covers the sourcing of potential suppliers, inviting offers, evaluating the offers received, preparing recommendations and contracting the successful supplier. It also covers arranging importation of the goods, including satisfying regulatory requirements, arranging required payments and ensuring all contractual obligations are met. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who conduct international purchasing of specified goods within workplace policies and procedures and regulatory frameworks. Individuals undertaking this unit are typically purchasing in accordance with organisational international purchasing guidelines and work under minimal supervision of a senior purchasing manager or in consultation with senior management.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Source international suppliers	1.1. Identify goods to be purchased internationally 1.2. Research potential sources of supply from relevant ***information sources*** 1.3. Examine market structures for proposed purchases 1.4. Determine ***regulations*** governing international purchasing 1.5. Identify potential sources of supply from research 1.6. Seek ***assistance and clarification*** as required on which workplace procedures, policies and regulations govern the international purchasing of specified goods 1.7. Apply workplace procedures, policies and regulations governing the international purchasing of specified goods

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ELEMENT	PERFORMANCE CRITERIA
2. Prepare invitations to offer for imported goods	2.1. Obtain and clarify ***specifications*** of requirements for international purchasing of specified goods from relevant personnel as required 2.2. Select purchasing strategy most appropriate to the proposed purchase 2.3. Develop and document invitations to offer 2.4. Ensure invitations to offer are checked for compliance with regulations, organisation's policies and procedures and description of required goods 2.5. Develop, document and obtain approval for ***criteria for evaluating offers*** 2.6. Issue invitations to offer to prospective suppliers after gaining approval from relevant personnel to release them
3. Prepare recommendations in response to offers	3.1. Receive offer documents from suppliers 3.2. Assess offer documents against documented criteria and requirements of purchasing strategies 3.3. Seek further information from suppliers, as required, to clarify offers 3.4. Evaluate offers against purchasing criteria 3.5. Select preferred offer and make recommendation for approval to relevant personnel 3.6. Obtain approval for recommended offers
4. Action successful offers	4.1. Draft contract with successful supplier 4.2. Access legal expertise to ensure legality of contract agreements 4.3. Issue contract in accordance with received approval 4.4. Inform unsuccessful offers of outcome of evaluation process
5. Arrange importation of goods	5.1. Assess risks in ownership and transport of goods from point of delivery to final destination 5.2. Arrange relevant insurance cover 5.3. Seek ***agents*** as required to arrange inspection, packing, transport, importation, customs clearance and delivery of goods into store 5.4. Satisfy statutory and regulatory requirements including fumigation and export/import controls 5.5. Ensure supply and logistics channels are managed to delivery of goods is achieved satisfactorily and within designated timelines

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ELEMENT	PERFORMANCE CRITERIA
6. Arrange provision of foreign currency payments	6.1. Obtain advice on payment strategy to be followed 6.2. Receive arrangements made to initiate currency hedging, letter of credit or payment by direct cheque in accordance with advice 6.3. Authorise payments at appropriate times
7. Ensure all contractual obligations are satisfied	7.1. Ensure that ***actions*** are taken to ensure that any non-compliance with contractual conditions and specifications is rectified

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- information management skills to prepare invitations to offer accurately and in sufficient detail
- organisation and time management skills to source suppliers and release required documentation in a timely fashion
- literacy skills to document invitations to offer
- communication skills to liaise with suppliers and in gaining approvals and advice from others involve din the purchasing process
- skills to conduct a risk assessment for purchasing the specified goods from each supplier.

Required knowledge

- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - consumer protection legislation
  - contract law
  - import of goods and services, where relevant
  - sale of goods legislation
  - Trade Practices Act
- methods of payment applicable to international purchasing
- organisational policies and procedures for international purchasing

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REQUIRED SKILLS AND KNOWLEDGE

• range of agencies and organisations involved in arranging importation arrangements such as:
  • consultants
  • customs brokers
  • freight forwarders
  • logistics and transport companies
• relevant insurance brokers and range of available types of policies to cover risks of international purchasing
• relevant insurance brokers and range of available types of policies to cover risks of international purchasing
• sources of information and assistance external to organisation, for example:
  • Austrade
  • chambers of commerce
  • customs brokers
  • regulatory authorities such as Australian Custom Service (ACS) and Australian Quarantine Inspection Service (AQIS)
  • state/territory government departments or agencies.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • sourcing of international suppliers for specified goods • preparation and issuing of invitations to offer • evaluation and selection of successful offers • issuing of contracts with preferred suppliers • informing unsuccessful suppliers of outcome of evaluation process.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment

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EVIDENCE GUIDE	
	• access to office equipment and resources • organisation's purchasing strategies and relevant purchasing records.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of draft and finalised invitations to offer and contracts for the supply of international goods • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of evaluating offers against selection criteria • observation of contacting successful and unsuccessful suppliers about the awarding of the contract • oral or written questioning to assess knowledge • review testimony from team members, colleagues, supervisors or managers • review of authenticated documents from the workplace or training environment.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other purchasing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information sources may include:	• Austrade and state/territory government departments or agencies and chambers of commerce

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RANGE STATEMENT	
	• catalogues and directories • existing databases of suppliers • international branches and affiliates of organisation • internet • trade or industry publications

Regulations may include:	• Australian Customs Act
	• legislation, codes of practice and national standards, for example:
	  • other Australian legislation relating to restrictions and prohibitions on imports
	  • quarantine legislation

Assistance and clarification may be sought from:	• external parties, for example regulatory authorities such as:
	  • Australian Customs Service (ACS)
	  • Australian Quarantine Inspection Service (AQIS)
	  • customs brokers
	  • Austrade
	• manager or other personnel within the organisation

Specifications may include:	• designated timelines • indications of price range to be paid • packaging requirements • quantities required • relevant quality parameters for goods • size, capacity and volume of individual items • technical descriptions of goods to be purchased
Criteria for evaluating offers may include:	• any preferences for country of origin • availability and ability to meet designated timelines • clarity of offer • cost structure • quality parameters • value adding offered by suppliers including technical support and guarantees
Agents include:	• customs brokers • freight forwarders • logistics and transport companies and consultants

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RANGE STATEMENT	
Actions may include:	• imposition of fines or penalties • interventions by self • referral to more senior personnel within organisation, regulatory bodies and agents involved in arranging importation of goods

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Purchasing and Contracting

Co-requisite units

Co-requisite units		

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BSBPUR501C Develop, implement and review purchasing strategies

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required knowledge and Range Statement changed to include environmentally sustainable practices. Replaces BSBPUR501B Develop, implement and review purchasing strategies

Unit Descriptor

This unit specifies the outcomes required to develop, implement and evaluate an organisation's purchasing strategies, and implement improvements to those strategies.

Application of the Unit

This unit applies to individuals who develop strategies detailing the organisation's policies, guidelines and procedures for purchasing.

The unit is typically undertaken by a senior purchasing officer or purchasing manager. While they may work closely with other staff members in the organisation, they have individual responsibility and autonomy to develop, communicate and implement organisational purchasing strategies.

Individuals undertaking this unit support the work of other employees carrying out purchasing activities.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Determine purchasing objectives	1.1 Research and analyse the suitability of industry benchmarks for purchasing for the organisation 1.2 Analyse organisation's purchasing data and information 1.3 Undertake consultations with ***relevant stakeholders*** and ***personnel*** to inform development of purchasing objectives 1.4 Draft purchasing objectives in line with organisation's goals 1.5 Gain approval from relevant personnel for purchasing objectives
2. Develop purchasing strategies	2.1 Develop ***purchasing strategies***, taking into account ***legal requirements*** and purchasing objectives 2.2 Include ***five rights*** in purchasing criteria 2.3 Develop human resource, financial and other plans to support implementation of purchasing strategies 2.4 Make changes resulting from feedback from relevant personnel about purchasing plans and strategies 2.5 Gain approval for plans to implement purchasing plans and strategies
3. Implement purchasing strategies	3.1 Communicate purchasing strategies to relevant personnel and stakeholders 3.2 Access ***resources*** needed to implement purchasing strategies 3.3 Provide ***support*** to implement purchasing strategies 3.4 Monitor implementation of purchasing strategies by the

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	organisation 3.5 Identify and address problems and issues arising during implementation of purchasing strategies 3.6 Provide reports to relevant personnel and stakeholders on the implementation of purchasing strategies
4. Evaluate purchasing strategies and implement improvements	4.1 Review implementation of purchasing strategies 4.2 Identify improvements to purchasing strategies from review process 4.3 Gain approval to implement improvements to purchasing strategies 4.4 Communicate improvements to relevant stakeholders and provide support to implement improvements 4.5 Monitor and review implementation of improvements to determine their effectiveness

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- communication and negotiation skills to liaise with suppliers and relevant stakeholders and negotiate agreement appropriate purchasing strategies
- literacy skills to write purchasing policies and procedures and reports containing complex concepts
- financial management skills to create and manage a budget framework for conducting purchasing activities
- technology skills to operate software relating to online purchasing.

Required knowledge

- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - consumer protection legislation
  - contract law
  - import of goods and services, where relevant
  - sale of goods legislation

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    - Trade Practices Act
- information about industry benchmarks for purchasing, including information from:
    - peak bodies and industry associations
- Australian Standards organisation policies and procedures related to:
    - business terms and conditions for purchasing, tendering and contracting
    - contracting and tendering
    - ethical behaviour
    - purchasing
- product knowledge related to goods and services required by the organisation
- principles and practice in environmentally sustainable purchasing and supply
- range of software programs used in online purchasing.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of purchasing objectives and strategies for an organisation • implementation of those purchasing strategies in an organisation • evaluation and implementation of improvements to purchasing strategies in an organisation.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • organisation's purchasing strategies and relevant purchasing records.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of documented purchasing objectives and strategies • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

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	• oral or written questioning to assess knowledge • review testimony from team members, colleagues, supervisors or managers • review of authenticated documents from the workplace or training environment.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other purchasing units.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Relevant stakeholders may include:	• clients • contractors • customers • suppliers • tenderers.
Personnel may include:	• Board members • CEOs • coordinators • internal users of purchased goods and services • leaders • managers • owners • relevant staff in other work sections • staff in own work section, team members and colleagues • supervisors.
Purchasing strategies may include:	• criteria for evaluating purchasing performance • different policies, procedures and strategies for different dollar values of purchases • key performance indicators for purchasing • limits of authority to approve purchases • methodology for evaluating purchasing performance

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	• organisational and industry codes of conduct and ethics • policies, procedures, guidelines and documentation formats for purchasing from suppliers including entities owned by the organisation, partners, alliance members and local and distant suppliers • requirements for fairness and transparency in purchasing • environmentally sustainable purchase and supply of goods and services.
Legal requirements may include issues in relation to:	• access and equity • accreditation, licence, patent and copyright • codes of practice • data collection, storage and retrieval • ethical conduct and governance • industrial relations • insurance • occupational health and safety • operation, maintenance and service of tools, equipment, plant and machinery • planning • privacy and confidentiality • professional development • standards (Australian and international) • warranties.

The five rights are:	• right supplier:
	  • demonstrable expertise and experience
	  • due diligence requirements
	  • ethical conduct requirements
	  • evidence of past legal compliance
	  • requirements to use organisations linked by ownership, partnership, alliance or other arrangements
	• right price:
	  • cost/price analysis
	  • value-for-money
	• right quantity:
	  • supply guarantees
	• right quality:
	  • confidentiality and probity requirements
	  • key performance indicators
	  • measures to manage risk
	  • quality accreditation

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	• right time: • supply guarantees.
Resources may include human, physical and other resources such as:	• documentation required for purchasing, such as proformas, order forms, standard tender documentation and basic standard contracts • software systems for inventory management or online purchasing • staff to undertake or assist with purchasing.
Support may include:	• information sessions and briefings • training programs • written information including procedures and internet or intranet-based information.

Unit Sector(s)

Administration – Purchasing and Contracting

Custom Content Section

Not applicable.

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BSBPUR502B Manage supplier relationships

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit specifies the outcomes required to manage relationships with suppliers of larger purchases or multiple smaller purchases, where the relationship is of some significance to the organisation. It covers managing purchasing agreements, resolving disagreements with suppliers, finalising agreements, and reviewing the performance of suppliers. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who mange the relationships with the suppliers to an organisation. The unit is typically undertaken by a senior purchasing officer or purchasing manager. While they may work closely with other staff members in the organisation, they have individual responsibility and autonomy to establish, maintain and develop supplier relationships and resolve any disputes arising with suppliers. Individuals undertaking this unit support the work of other employees in maintaining supplier relationships.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Manage purchasing agreements	1.1. Monitor supplier performance throughout the duration of ***agreements*** 1.2. Identify, monitor and manage risks in ***risk management plans*** throughout the duration of agreements 1.3. Identify and address potential and actual performance issues 1.4. Negotiate and resolve amendments to agreements as a consequence of addressing performance issues 1.5. Seek and obtain approval for amendments 1.6. Communicate approved amendments to suppliers and ***relevant personnel***
2. Resolve disagreements with	2.1. Identify and investigate causes of ***disagreements***

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ELEMENT	PERFORMANCE CRITERIA
suppliers	with suppliers and assess heir validity 2.2. Negotiate and resolve disagreements 2.3. Document amendments to agreements as a consequence of the resolution of disagreements 2.4. Seek and obtain approval for amendments 2.5. Communicate approved amendments to suppliers and relevant personnel
3. Finalise agreements	3.1. Confirm all supplier obligations as having been met prior to agreements being finalised 3.2. Finalise purchasing agreements on ***completion*** of contract 3.3. Document arrangements to finalise agreements
4. Review performance of suppliers	4.1. Evaluate supplier performance against the requirements of purchasing agreements 4.2. Inform suppliers of evaluation outcomes as required 4.3. Make ***recommendations*** about future use of suppliers to relevant personnel

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to liaise with suppliers and relevant personnel and gain agreement on required performance levels
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to write reports containing complex concepts.

Required knowledge

- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - consumer protection legislation
  - contract law
  - import of goods and services, where relevant
  - sale of goods legislation

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REQUIRED SKILLS AND KNOWLEDGE

• Trade Practices Act
• methodologies to monitor, review and evaluate supplier performance
• organisation's policies and procedures related to:
  • conduct and ethics
  • OHS
  • purchasing
  • tendering and contracting
• product knowledge related to goods and services required by the organisation.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • successfully managed relationships with suppliers over the life of specific purchasing agreements • resolution of a dispute with a supplier • finalisation of an agreement with a supplier • evaluation of supplier performance and formulation of recommendations about future use of supplier.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • organisation's purchasing strategies and relevant purchasing records • access to organisation's policy and procedures for purchasing.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of

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EVIDENCE GUIDE	
	portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of actions taken to resolve disagreements with suppliers • oral or written questioning to assess knowledge • review of testimony from team members, colleagues, supervisors or managers • review of authenticated documents from the workplace or training environment.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other purchasing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Agreements may include:	• all conditions applying from commencement to completion and closure of agreement • conditions set out in a contract, memorandum of understanding or other documented agreement
Risk management plans may include:	• documentation of outcomes of risk analysis including occupational health and safety, and how risks are to be addressed
Relevant personnel may include:	• CEOs • managers • leaders • coordinators • OHS specialists and supervisors • internal users of supplied goods and services • personnel involved in purchasing

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RANGE STATEMENT	
Disagreements may include:	• costs, fees and prices • delivery schedules • interpretations of specifications detailed in documents on which agreements are based • interpretations of terms and conditions detailed in agreement • quality of goods or services, including OHS performance standards
Completion of purchasing agreement may include:	• after agreed number or volume of items have been supplied • at end of fixed time period • mutually-agreed time, including prior to that specified in agreement
Recommendations may include:	• to file relevant supplier details for future reference • to renew agreement for further purchasing • to seek new sources of supply

Unit Sector(s)

Unit sector	

Competency field

Competency field	Administration - Purchasing and Contracting

Co-requisite units

Co-requisite units		

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BSBPUR503C Manage international purchasing

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Required knowledge and Range Statement changed to include environmentally sustainable practices. Replaces BSBPUR503B Manage international purchasing

Unit Descriptor

This unit specifies the outcomes required to manage international purchasing of specific goods within workplace policies and procedures and regulatory frameworks.

Application of the Unit

This unit applies to individuals who are responsible for managing international purchasing in an organisation. These individuals develop and implement relevant supply chain management strategies, and manage and review the implementation of improvements to international purchasing strategies.

Individuals undertaking this unit support the work of other employees carrying out international purchasing functions.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Develop and document strategies for international purchasing	1.1 Research and analyse ***strategic implications*** for the organisation's international purchasing 1.2 Research international market structures 1.3 Research and analyse ***export requirements*** of supplier country 1.4 Draft and submit organisation's strategies for international purchasing for approval
2. Implement international purchasing strategies	2.1 Communicate international purchasing strategies to relevant personnel and stakeholders 2.2 Provide support to stakeholders to implement international purchasing strategies 2.3 Monitor implementation of international purchasing strategies within the organisation 2.4 Identify and address problems and issues arising from implementation of international purchasing strategies
3. Undertake more complex international purchasing	3.1 Ensure that export markets and ***cultural considerations*** having a potential impact on international purchasing are researched and appropriate markets chosen 3.2 Research and apply relevant ***international legal requirements*** on sale of goods and ***Australian regulatory controls*** applicable to imports into Australia 3.3 Apply relevant ***INCOTERMS*** and trade terms to international purchasing 3.4 Draft exception clauses to business conditions 3.5 Clarify and resolve any discrepancies to the satisfaction of all parties 3.6 Prepare draft contract and access legal expertise to check

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	legality of contract agreement
4. Determine payment strategies	4.1 Analyse financial risk and implement available ***controls*** 4.2 Identify source and availability of funds for payment 4.3 Research and analyse ***currency payment methods*** 4.4 Select currency payment methods 4.5 Plan and implement expenditure phasing
5. Arrange barter or countertrade	5.1 Research and analyse strategic implications of arranging specific ***barter*** or ***countertrade*** 5.2 Determine suppliers willing to engage in international ***barter or countertrade*** 5.3 Negotiate and reach agreement with partners on commercial conditions for proposed ***barter or countertrade*** 5.4 Prepare draft contract and access legal expertise to check legality of contract agreement 5.5 Approve and issue contracts 5.6 Investigate and resolve any disagreements and discrepancies to the satisfaction of all parties
6. Determine logistics strategies	6.1 Arrange inspection following ascertaining ***requirements for pre-shipment inspection*** 6.2 Research and analyse shipping facilities and other transport risks 6.3 Research and analyse ***regulatory compliance requirements*** for importation into Australia 6.4 Develop logistics strategies for the organisation taking into account appropriate transport, insurance and regulatory compliance requirements 6.5 Gain approval from relevant personnel for implementation of logistics strategies
7. Evaluate international purchasing strategies and implement identified improvements	7.1 Review implementation of international purchasing strategies 7.2 Identify improvements to international purchasing strategies from the review process 7.3 Gain approval to implement improvements to international purchasing strategies 7.4 Communicate changes to relevant stakeholders and support provided to implement improvements 7.5 Monitor and review implementation of changes is to determine effectiveness of improvements

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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- literacy skills to develop and document international purchasing strategies, draft contracts and produce international purchasing documentation
- negotiation and verbal communication skills to successfully conduct international purchasing activities in a cross cultural context and within organisation
- organisational and time management skills to ensure international purchasing activities are conducted in a timely manner
- problem-solving skills to overcome obstacles arising in international purchasing activities
- research skills to analyse international markets and regulatory requirements affecting international purchasing
- risk management skills.

Required knowledge

- international markets and cultural considerations relevant to purchasing in supplier countries
- international issues in environmentally sustainable supply chain management
- knowledge of INCOTERMS
- methods of payment applicable to international purchasing, including barter and countertrade
- organisational policies and procedures for international purchasing
- range of available agencies involved in arranging importation arrangements such as:
  - consultants
  - customs brokers
  - freight forwarders
- range of available insurance brokers and types of policies to cover identified risks
- sources of information and assistance external to organisation, for example:
  - Austrade
  - chambers of commerce
  - customs brokers
  - regulatory authorities, such as ACS and AQIS
  - state/territory government departments or agencies
- range of available logistics and transport companies.

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Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • completion of documented international purchasing strategies for an organisation • implementation of international purchasing strategies in an organisation • completion of a complex international purchase • completion of a barter or countertrade • implementation an evaluation of transport and logistics strategies to obtain goods purchased internationally.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • organisation's purchasing strategies and relevant purchasing records.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of documented international purchasing strategies • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of actions undertaken to achieve an international purchase • oral or written questioning to assess knowledge • review testimony from team members, colleagues, supervisors or managers • review of authenticated documents from the workplace or training environment.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other purchasing units.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Strategic implications may include:	• business risks • compliance requirements • economic and financial implications • establishment of overseas branches and agencies or representatives • knowledge and information requirements • environmental sustainability supply chain requirements.
Export requirements may include:	• business processes and practices of supplier country • compliance with legislation • international treaties • quotas • tariffs • trading agreements.
Cultural considerations may include:	• attitudes • beliefs • business processes and practices within supplier country • culturally appropriate communication styles • perception of Australia • values.
International legal requirements may include:	• international law • international trade agreements and treaties • legislation applicable to supplier country.
Australian regulatory controls may include:	• Australian Customs Service (ACS) requirements • Australian Quarantine Inspection Service (AQIS) requirements • Australian Taxation Office requirements • requirements of other government departments and agencies • Trade Practices Act.
INCOTERMS refer to:	• the set of international rules for the interpretation of trade terms published by ICC (International Chamber of

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	Commerce) and applied to imports and exports to specify transportation and payment conditions.
Controls may include:	• guarantees • insurance • other strategies to minimise or transfer risk • selection or rejection of particular payment methods • specifying a particular currency for payment.
Currency payment methods may include:	• hedging • letters of credit • payment by cheque upon/after shipment.
Barter refers to:	• the simultaneous exchange of goods between the importer and exporter.
Countertrade refers to:	• a trading transaction where export sales to a particular market are made on the condition that imports from that particular market are accepted in return.

Requirements for pre-shipment inspection may include:	• checks made of things such as:
	  • checks of condition of goods prior to shipment
	  • labelling of goods and containers
	  • packaging (including condition of containers)
	  • quality
	  • quantities
	  • separation of goods to comply with Australian regulations such as Dangerous Goods Act.

Regulatory compliance requirements may include:	• fumigation and quarantine regulations • labelling requirements • legislation and regulations related to prohibited imports • separation of goods to comply with Australian regulations such as Dangerous Goods Act.

Unit Sector(s)

Administration – Purchasing and Contracting

Custom Content Section

Not applicable.

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BSBPUR504B Manage a supply chain

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit specifies the outcomes required to manage a supply chain, including the relationships between an organisation and its supply and demand partners along the chain. It covers implementing a demand driven supply chain management strategy, managing the supply chain, and evaluating and improving supply chain effectiveness. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are responsible for managing a supply chain in an organisation. These individuals develop and implement relevant supply chain management strategies, and manage and review the implementation of improvements to international purchasing strategies. Individuals undertaking this unit support the work of other employees carrying out supply chain management functions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Implement demand driven supply chain management strategy	1.1. Assign responsibility for ***supply chain management*** within the organisation in accordance with supply chain management strategy 1.2. Access and operationalise technology and software for implementation of the supply chain management system within the requirements of the strategy and budgetary allocation 1.3. Design policies and procedures to guide business relations and operations in accordance with the strategy 1.4. Design or re-design ***supporting business processes*** to support implementation of the strategy 1.5. Provide ***support*** to staff, customers and supply chain to assist in implementation of the supply chain management strategy

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ELEMENT	PERFORMANCE CRITERIA
2. Manage supply chain	2.1. Manage communication and information exchange with strategic partners and suppliers in accordance with the supply chain management strategy 2.2. Facilitate and collaborate with supply chain organisations to determine demand at each level of the supply chain in accordance with the supply chain management strategy 2.3. Manage sales and payments in accordance with supply chain and risk management strategies, and legal and ethical requirements 2.4. Implement actions to build trust and foster a supply chain culture in accordance with the supply chain management strategy 2.5. Identify opportunities to adjust policies and procedures to respond to the changing needs of customers, supply chain and the organisation
3. Evaluate and improve supply chain effectiveness	3.1. Monitor ***demand chain management*** and supply chain management in accordance with the supply chain management strategy 3.2. Review and identify ***improvements in the effectiveness of the supply chain*** with each level of the supply chain, including staff and customers 3.3. Compare business data and reports to outcomes, budgets, timelines and forecasts to actual performance 3.4. Review technology performance and make recommendations for improvements to hardware, software and/or their use in accordance with strategy and budget 3.5. Use feedback and evaluation results to plan and improve future supply chain management strategies

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities

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REQUIRED SKILLS AND KNOWLEDGE
• communication and interpersonal skills to establish working relationships with customers, supply chain members and internal colleagues • literacy skills to document policies and procedures for supply chain management and to write reports containing complex concepts • leadership skills to coordinate supply chain management policy development and successfully implement those policies • technology skills to use software applicable to managing a supply chain.
Required knowledge

• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  • consumer protection legislation
  • contract law
  • import of goods and services, where relevant
  • sale of goods legislation
  • Trade Practices Act
• organisation policies and procedures related to:
  • business terms and conditions for purchasing, tendering and contracting
  • contracting and tendering
  • ethical behaviour
  • purchasing
  • supply chain management
• product knowledge related to goods and services required by the organisation
• techniques to establish collaborative relationships.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • implementation of a supply chain management strategy • successful management of a supply chain

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EVIDENCE GUIDE	
	• evaluation and formulation of recommendations for improvement to supply chain management strategy.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • organisation's purchasing strategies and relevant purchasing records.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of documented supply chain management strategies • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge • review testimony from team members, colleagues, supervisors or managers • review of authenticated documents from the workplace or training environment.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other purchasing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Supply chain management refers	• management of the entire cycle from raw materials to producers, component suppliers,

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RANGE STATEMENT	
to:	manufacturers, wholesalers, third party service providers, retailers, customers and recyclers, plus freight, distribution and cash flow
Supporting business processes may include:	• accounting • administration • data input • delivering and receiving • ordering • payments • online and other technological inventory management or supply chain integration software
Support may include:	• intranet site information • mentoring and coaching arrangements • policies, procedures and guidelines • provision of a help-desk or contact persons • workshops, briefings and training programs • written documentation in the form of manuals, help books, protocols, etc
Demand chain management is:	• a collaborative process that involves determining how much product needs to be produced at each level of the supply chain through to the end consumer
Improvements in the supply chain may include:	• the role of 'middlemen' or other middle supply chain elements being reduced or made redundant as newer more efficient supply chain methodologies and technologies are implemented • new value being created between producers and consumers

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Administration - Purchasing and Contracting

Co-requisite units

Co-requisite units		

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BSBREL401A Establish networks

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and maintain effective work relationships and networks. It covers the relationship building and negotiation skills required by workers within an organisation as well as freelance or contract workers. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of networking and negotiation who contribute well developed skills in creating solutions to unpredictable problems through analysis and evaluation of information from a variety of sources. They may have responsibility to provide guidance or to delegate aspects of tasks to others.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop and maintain business networks	1.1. Use appropriate ***network strategies*** to establish and maintain relationships that promote the development of business opportunities 1.2. Identify and pursue network opportunities to maximise a range of contacts 1.3. Communicate information regarding new networks to inform individuals, colleagues and clients of potential benefits 1.4. Participate in ***professional networks and associations*** to obtain and maintain personal knowledge and skills
2. Establish and maintain business relationships	2.1. Develop and maintain relationships to promote benefits consistent with ***organisational/client requirements*** 2.2. Gain and maintain trust and confidence of contacts through demonstration of high standards of business practices 2.3. Use a high level of ***negotiation skills*** to encourage positive outcomes 2.4. Identify difficult situations and negotiate solutions using collaborative problem-solving techniques

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ELEMENT	PERFORMANCE CRITERIA
	2.5. Seek specialist advice in the development of contacts where appropriate
3. Promote the relationship	3.1. Develop strategies to represent and promote the interests and requirements of the relationship 3.2. Use appropriate presentation skills to communicate the goals and objectives of the relationship 3.3. Effectively communicate issues, policies and practices of the relationship to a range of audiences, in writing and verbally 3.4. Obtain ***feedback*** to identify and develop ways to improve promotional activities within available opportunities

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to receive and report on feedback, to maintain effective relationships and to manage conflict • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • leadership skills to gain trust and confidence of clients and colleagues • negotiation skills to achieve mutually acceptable outcomes • technology skills to support effective communication and presentation.
Required knowledge
• client or organisational policies, plans and procedures • related organisations, agencies and networks • trends and forecasts for relevant industries, services and products.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the

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EVIDENCE GUIDE	
performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • establishing contacts and participating in networks • identifying opportunities for networking • knowledge of related organisations, agencies and networks • maintaining records of relevant contacts.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of networking strategies and documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation communicating issues, policies and practices of the relationship to a range of audiences • evaluation of promotional strategies • observation of negotiation of solutions between groups and individuals • observation of promotional presentations.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • interpersonal communication units • other relationship management units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Network strategies may include:	• association memberships • conference participation • distributing materials • individual marketing • maintaining regular contact • seminar attendance
Professional networks and associations may include:	• advisory committees • colleagues • committees • government agencies • internal/external customers • lobby groups • local inter-agency groups • other organisations • professional/occupational associations • project specific ad hoc consultative/reference groups • specific interest or support groups • suppliers • work team
Organisational/client requirements may be included in:	• access and equity principles and practices • defined resource parameters • ethical standards • goals, objectives, plans, systems and processes • legal and organisational policies, guidelines and requirements • marketing plan • occupational health and safety policies, procedures and programs • quality and continuous improvement processes and standards • quality assurance and/or procedures manuals

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RANGE STATEMENT	
Negotiation skills may include:	• assertiveness • bargaining • collaboration • confidence building • conflict reduction • empathising • offers and counter offers • solution designing • stress management
Feedback may include:	• accuracy and sufficiency of information • appropriateness of audience • benefits to organisation • impact of message • liaison with networks • participation of competitors • use of media

Unit Sector(s)

Unit sector	

Competency field

Competency field	Stakeholder Relations - Relationship Management

Co-requisite units

Co-requisite units		

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BSBREL402A Build client relationships and business networks

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish, maintain and improve client relationships, and to actively participate in networks to support attainment of key business outcomes. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals in a variety of roles who are required to establish, maintain and improve client relationships to facilitate organisational objectives. This unit primarily applies to marketing and sales professionals who depend on excellent interpersonal relationships and communication skills to achieve outcomes, but may also apply to other individuals working in any industry.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Initiate interpersonal communication with clients	1.1. Identify and use ***preferred client communication styles and methods*** 1.2. Establish rapport with clients using ***verbal*** and ***non-verbal communication*** processes 1.3. Investigate and act upon opportunities to offer positive feedback to clients 1.4. Use open questions to promote two-way communication 1.5. Identify and act upon potential ***barriers to effective communication*** with clients 1.6. Initiate communication processes which relate to client needs, preferences and expectations
2. Establish client relationship management strategies	2.1. Develop client loyalty objectives focussing on the development of long term business partnerships 2.2. Assess client profile information to determine approach 2.3. Develop ***client loyalty strategies*** to attract and retain

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ELEMENT	PERFORMANCE CRITERIA
	clients in accordance with the business strategy 2.4. Identify and apply ***client care and client service standards***
3. Maintain and improve ongoing relationships with clients	3.1. Develop ***strategies to obtain ongoing feedback*** from clients to monitor satisfaction levels 3.2. Develop strategies to elicit feedback which provide information in a form that can be used to improve relationships with clients 3.3. Obtain feedback to develop and implement strategies which maintain and improve relationships with clients
4. Build and maintain networks	4.1. Allocate time to establish and maintain business contacts 4.2. Participate in ***business associations*** and/or ***professional development activities*** to establish and maintain a ***network*** of support for the business and to enhance personal knowledge of the market 4.3. Establish communication channels to exchange ***information and ideas*** 4.4. Provide, seek and verify information to the network

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to determine client needs and preferences through active listening and presenting ideas clearly and precisely • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • interpersonal skills to establish rapport, and to build and maintain relationships with clients.
Required knowledge

• key provisions of relevant legislation from all forms of government, codes of practice and national standards that may affect aspects business operations, such as:
  • anti-discrimination legislation
  • consumer laws including appropriate state/territory legislation

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REQUIRED SKILLS AND KNOWLEDGE
• ethical principles • marketing code of practice • privacy laws • Trade Practices Act • marketing communications concepts and processes • principles and techniques for effective communication and networking • sources of business related networks.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • establishing and maintaining relationships with a range of clients related to the candidate's business • participating in and providing, an active contribution to a business related network.
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports or journals on client relationship activities • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of the candidate communicating with clients • observation of presentations made to business networks • oral or written questioning to assess knowledge and understanding

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EVIDENCE GUIDE	
	• review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other relationship management units • marketing units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Preferred client communication styles and methods may include:	• email • face-to-face • mail • phone
Verbal communication may include:	• articulation • clarity of speech • feedback • language • listening skills • open questions • questioning skills • voice modulation • voice projection
Non-verbal communication may include:	• active listening • body language • body orientation • clothing • colour • distance

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RANGE STATEMENT	
	• facial expression • grooming • gestures • music • posture • sound • touching • voice
Barriers to effective communication may include:	• acting on false assumptions and stereotypes • cultural differences not being addressed • educational differences not being addressed • failure to prominently display contact details in all communications provided to the client • inappropriate word choice • ineffective non-verbal communication • lack of 'contact us' forms or pages on websites • lack of distribution of reply paid cards or envelopes in mail outs • lack of voice modulation and articulation • limited opening hours of call centres or office • not listening actively • organisational factors • physical, personal, gender and age differences not being addressed
Client loyalty strategies include:	• access to dedicated staff • added value offers • anniversary offers • client clubs • client reward schemes • credit or discount facilities • dedicated or private facilities • discounts • formal letter of thanks • frequent purchaser programs • handwritten note thanking the client • offering promotional items • phone call thanking client for the business • regular recontact with best clients • thank you gifts and promotions
Client care and client service	• accuracy of billing

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RANGE STATEMENT	

standards may include:	• accuracy of product/service descriptions, specifications in marketing communications
	• complaint resolution times
	• incidences of stock outs and back orders
	• on-hold times
	• order delivery standards such as:
	  • whether right product or service was delivered
	  • delivered to right person or address
	  • delivered on time
	  • politeness, helpfulness and grooming of delivery staff
	  • delivery vehicles parked properly
	  • cleanliness of delivery vehicles
	• shipment tracking services
	• telephone answering times and responses

Strategies to obtain ongoing feedback may include:	• including 'comments and queries' or 'bouquets and brickbats' on all order forms • complaints handling procedures • email • letter • soliciting complaints • surveys of current clients • surveys of lapsed clients to determine reason/s for ceasing to buy • telephone interviews • training staff to ask open questions about product or service levels
Business associations may include:	• chambers of commerce • industry associations • institutes • professional bodies • societies
Professional development activities may include:	• demonstrations • exhibitions • fairs • industry information seminars • industry training • pre-launch activities • technical information briefings

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RANGE STATEMENT	
	• trade shows
Networks may include:	• business • formal • groups • individuals • informal • organisations • personal
Information and ideas may include:	• changes in the environment • changing customer requirements • information on competitors' activities • personal, professional or business support

Unit Sector(s)

Unit sector	

Competency field

Competency field	Stakeholder Relations - Relationship Management

Co-requisite units

Co-requisite units		

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BSBREL403A Implement international client relationship strategies

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to implement international client relationships in line with a defined organisational strategy for international client relationships. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working with minimal supervision but with the support and assistance of a more senior person within the organisation. This unit addresses marketing goods and services internationally, in line with the organisation's marketing plan and marketing strategy for a specified international target market. The activities will be focused on the target market and will involve communication and executing tasks across cultural and geographic barriers. The unit does not include developing a client relationship strategy. This higher level activity is dealt with in BSBREL501A Build international client relationships.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Implement culturally appropriate interpersonal communication with clients	1.1. Seek ***advice*** on ***culturally appropriate interpersonal communication styles*** to use with international clients 1.2. Use culturally appropriate interpersonal communication styles with international clients 1.3. Seek ***feedback*** on appropriateness of communication style 1.4. Make changes to communication style as a result of feedback
2. Implement client relationship strategy	2.1. Seek clarification of details of the existing organisational client relationship strategy as required 2.2. Determine ***processes and practices*** to implement the client relationship strategy with international clients 2.3. Implement the client relationship strategy with

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ELEMENT	PERFORMANCE CRITERIA
	international clients 2.4. Identify issues and problems arising in implementing the client relationship strategy with international clients and take ***actions*** to address these issues
3. Monitor and improve client relationship strategy	3.1. Maintain ***records*** of client interactions according to organisational procedures 3.2. Seek feedback on ***quality and effectiveness*** of interactions with international clients 3.3. Identify and receive feedback on areas of improvement in international client interactions from monitoring processes 3.4. Make suggestions for changes in the organisation's client interaction strategy to ***relevant personnel*** 3.5. Implement areas of improvement to processes and practices associated with the client relationship strategy 3.6. Monitor changes made to processes and practices associated with the client relationship strategy for quality and effectiveness of interactions with international clients

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • communication skills to seek and use feedback to improve current practice • literacy skills to maintain records of client interactions • problem-solving skills to address issues arising in communicating with international clients.
Required knowledge
• identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:

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REQUIRED SKILLS AND KNOWLEDGE
• Trade Practices Act • World Trade Organization determinations • cultural awareness relevant to international clients • application of an organisational client relationship strategy.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying and using culturally appropriate communication styles across a range of clients • ensuring client interactions are in line with relationship strategy and contribute to business performance • monitoring performance to make improvements to processes and practices • knowledge of cultural awareness relevant to international clients.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to relevant workplace documents • access to feedback from clients.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of records maintained about client interactions • analysis of responses to case studies and scenarios

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EVIDENCE GUIDE	
	• observation of interpersonal interaction with clients and business network members • oral or written questioning to assess knowledge of relevant Australian, international and local legislation • assessment of actions taken to address issues and problems identified in implementing the client relationship strategy with international clients.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • communication units or other international business units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Advice may be sought from:	• academic publications and personnel • advice provided by Austrade and state/territory government agencies, chambers of commerce • manager, supervisor or relevant specialist staff • trade and business publications • workplace documents
Culturally appropriate interpersonal communication styles may include:	• choice of medium for communication • culturally determined notions of polite behaviour • distance between communicating parties in face-to-face meetings • eye contact • forms of address • voice tone
Feedback may be obtained from:	• advisors within Austrade and state/territory government agencies, chambers of commerce

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RANGE STATEMENT	
	• demographic data • external advisors or experts • government sponsored trade missions • international clients • international trade directories • manager or supervisor
Processes and practices may include:	• cycle of telephone contacts • invitations to events and demonstrations • newsletters • samples provided to clients • visits to clients by organisation's representatives or self • written correspondence via letter, email, fax
Actions may include:	• interventions by self and colleagues • referral to manager • seeking external advice
Records may include:	• client management software • diary entries or logbooks • notes of conversations, discussions • written correspondence
Quality and effectiveness may include:	• contributions to business activity through interactions • cultural appropriateness of interactions • frequency of interaction • meeting expectations of clients • other indicators set within the organisation and documented processes and practices to evaluate the effectiveness of interactions
Relevant personnel may include:	• chief executive officer of organisation, board of directors • manager or supervisor • marketing manager

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Business Development - International Business

Co-requisite units

Co-requisite units		

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BSBREL501A Build international client relationships

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to build effective international client relationships. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for building, maintaining and improving effective relationships with international clients including building interpersonal communication strategies. This managerial responsibility also includes analysing, identifying and applying culturally appropriate communication strategies with these clients.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Build interpersonal communication strategies	1.1. Establish database of international clients with relevant ***fields***
	1.2. Establish and note preferred ***mode of communication*** for communicating with international clients
	1.3. Take into account the influence of ***geographic separation*** in establishing preferred mode of communication with international clients
	1.4. Use a ***diary*** of communications with international clients to provide reminder to facilitate regular contact with international clients
	1.5. Establish a record keeping strategy for communications with international clients
2. Analyse and identify culturally appropriate communication strategies with clients	2.1. Identify ***sources of information*** relating to ***culturally appropriate styles of communication*** for specific cultural groups among international clients
	2.2. Analyse and note, using available information sources, culturally appropriate styles of communication for specific cultural groups among international clients
3. Apply culturally appropriate communication strategies with clients	3.1. Use preferred client communication styles and modes of communication in communications with international clients
	3.2. Use culturally appropriate verbal and non-verbal

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ELEMENT	PERFORMANCE CRITERIA
	communication processes to establish rapport with international clients 3.3. Use active listening to establish rapport with international clients 3.4. Investigate and act upon opportunities to offer positive feedback to clients 3.5. Use open questions to promote two-way communication 3.6. Identify and act upon potential ***barriers*** to effective communication with international clients including those that are influenced by culture 3.7. Ensure communication processes initiated identify client needs, preferences and expectations
4. Maintain and improve relationships with international clients	4.1. Develop strategies to establish processes for obtaining ongoing feedback from international clients to monitor satisfaction levels using ***appropriate techniques*** 4.2. Use strategies developed to elicit feedback to provide information in a form that can be used to improve relationships with international clients 4.3. Use feedback obtained to develop and implement strategies to maintain and improve relationships with international clients 4.4. Review the effectiveness of communication with international clients on a regular basis

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • interpersonal skills to establish rapport, build relationships with others and demonstrate empathy in a cross-cultural context • technology skills to use a range of software to record details about international client relationships formed.
Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE
• characteristics of specific cultural groups • identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as: • Trade Practices Act • principles of communication theory, especially cross-cultural communication • range of products or services marketed by business in international settings • range of software programs to be used in financial reporting activities • sources of information about relevant cultural groups.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • building, maintenance and improvement of relationships with international clients over time • processes used to analyse, identify and apply culturally appropriate communication strategies with international clients • knowledge of characteristics of specific cultural groups.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to workplace documents and records.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party workplace

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EVIDENCE GUIDE	
	reports of on-the-job performance by the candidate • observation of presentations • observation of techniques used to gather market intelligence • oral or written questioning to assess knowledge of principles of communication theory, especially cross-cultural communication • review of communications diary with international clients • assessment of analysis and noting of culturally appropriate styles of communication for specific cultural groups among international clients • evaluation of strategies developed to establish processes for obtaining ongoing feedback from international clients.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBREL502A Build international business networks.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Fields may include:	• contact details (addresses, phone, fax, email, mobile) • cycle for contact • names of individuals and their companies • notes on preferred communication style • preferred mode of communication • records of communications • title/job role
Mode of communication may	• email

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RANGE STATEMENT	
include:	• fax • letter • phone • visit
Geographic separation may include:	• differences in time zones • lack of opportunities for face-to-face contact
Diary formats may include:	• electronic • linked to database of international clients • paper-based
Sources of information may include:	• academic publications and personnel • advice provided by Austrade and state/territory government agencies, chambers of commerce • staff within own organisation from same cultural group as international clients • trade and business publications
Culturally appropriate styles of communication may include:	• differences in assertiveness across cultures and individuals • distance between communicating parties • eye contact • forms of address used for names • voice tone
Barriers may include:	• cultural differences • educational differences • non-verbal communication • not listening actively • organisational • physical, personal, and age differences • stereotypes • voice modulation and articulation • word choice
Appropriate techniques may include:	• email • letter • survey instruments • telephone

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - International Business

Co-requisite units

Co-requisite units		

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BSBREL502A Build international business networks

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to build international business networks. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with managerial responsibility for setting up, maintaining and reviewing participation in international business networks to benefit the business and its clients in a culturally appropriate way.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop and maintain appropriate international business networks	1.1. Allocate time to build and maintain international business ***networks*** 1.2. Identify ***opportunities to build international business networks*** 1.3. Use participation in international and Australian ***business associations***, trade fairs, conferences, and ***professional development activities*** to establish and maintain a network of support for the business and to enhance personal knowledge of international markets 1.4. Identify and maximise opportunities to make face-to-face contact with overseas business associates and international business network members 1.5. Establish communication channels to exchange ***information and ideas*** with international business network members 1.6. Provide input to the network and seek and verify feedback
2. Reflect social and cultural awareness in developing and maintaining international business networks	2.1. Identify ***sources of information*** relating to ***social and cultural awareness*** for specific cultural groups within current and prospective network membership 2.2. Analyse and note sources of information relating to social and cultural awareness for specific cultural groups within current and prospective network

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ELEMENT	PERFORMANCE CRITERIA
	membership using available information sources 2.3. Use communication styles and social mores appropriate to specific cultural groups in relating to individuals and groups within the network 2.4. ***Review the quality of communication and relationships*** with network members on a regular basis to determine effectiveness of communication styles and interactions
3. Review own participation in international business networks	3.1. Estimate and document costs of own participation in international business networks 3.2. ***Quantify*** and document the value of outcomes derived from participation in international business networks 3.3. Analyse the value of outcomes derived from participation in international business networks in comparison to costs of participation 3.4. Ensure that decisions are made and implemented to increase, maintain or decrease participation in networking activity as a result of review process

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- interpersonal skills to demonstrate empathy and cultural sensitivity
- interpersonal skills to establish rapport and to build networks internationally
- research, analysis, evaluation and assessment skills to identify relevant business networks.

Required knowledge

- characteristics of specific cultural groups
- existing international business networks
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:

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REQUIRED SKILLS AND KNOWLEDGE
• Trade Practices Act • principles of communication theory, especially cross-cultural communication • sources of information about relevant cultural groups • sources of information related to cultural groups and support for international business activity.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • building, maintenance and review of international business network/s to facilitate improved cross-cultural and social communication • knowledge of interpersonal skills required to establish rapport and to build networks internationally.
Context of and specific resources for assessment	Assessment must ensure: • access to international business networks • access to workplace records including journals and diaries if required • access to feedback from other members of candidate's network.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of techniques used to build international business networks • oral or written questioning to assess knowledge of existing international business networks • review of opportunities identified to build

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EVIDENCE GUIDE	
	international business networks • assessment of analysis and noting of sources of information relating to social and cultural awareness for specific cultural groups within current and prospective network membership • evaluation of analysis of the value of outcomes derived from participation in international business networks in comparison to costs of participation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBREL501A Build international client relationships.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Networks may include:	• formal or informal • government sponsored networks through Austrade or state/territory government agencies • individuals, groups, organisations • personal or business • professional or trade networks
Opportunities to build international business networks may include:	• Austrade and state/territory government agency workshops, functions and events • company sponsored travel overseas • conferences • industry or business association functions and events • key events such as (overseas and Australian) national celebrations • product launches

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RANGE STATEMENT	
	• professional development activities • receptions by overseas government bodies in Australia and overseas (e.g. overseas trade delegations, embassies, consulates, trade attachÃ©s) • trade fairs
Business associations may include:	• government sponsored groups • industry bodies • professional associations
Professional development activities may include:	• Austrade and state/territory government agency workshops, functions and events • demonstrations • industry information seminars/conferences • industry training (formal or informal) • pre-launch activities • technical information briefings • trade shows/fairs
Information and ideas may include:	• changes in the environment • changing customer requirements • information on competitors' activities • opportunities for new international business activity • personal, professional or business support • trends and movements having an impact on international business activity
Sources of information may include:	• academic publications and personnel • advice provided by Austrade and state/territory government agencies, chambers of commerce • staff within own organisation from same cultural group as international clients • trade and business publications
Social and cultural awareness may include:	• aspects of culture and society unique to other countries that differ from Australian culture and society
Reviewing the quality of communication and relationships may include:	• analysing the business outcomes from relationships cultivated with network members • analysing the responses of network members • gauging confidence gained and given by network members
Quantifying may include:	• analysing future gains not yet realised • making estimations and approximations

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RANGE STATEMENT	
	• making projections based on trends

Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - International Business

Co-requisite units

Co-requisite units		

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BSBREL701A Develop and cultivate collaborative partnerships and relationships

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish collaborative partnerships and relationships with business and industry stakeholders to promote and advance learning programs. The unit also covers communicating to influence others, cultivating new and existing partnerships, establishing positive collaborative relationships, leading the establishment of a partnership program and establishing reporting mechanisms. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to leaders or managers working in either an educational organisation or a non educational enterprise where learning is used to build capabilities. It includes forming partnerships or other collaborative arrangements to achieve improved learner, community, career, or work outcomes. Educational leaders gain the respect of colleagues, contacts, clients and the community through demonstrating professionalism in all aspects of their work; this professionalism is underpinned by their educational expertise and effective interpersonal and communication skills. In the vocational education and training sector, learning leaders and managers must build partnerships and lead in a collaborative manner to ensure learning has a strategic role in the ever changing context, and in the face of complex influences that affect learning.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Communicate to influence relevant individuals and stakeholders	1.1. Generate trust, confidence and support from ***relevant individuals***, other ***stakeholders*** and ***potential learners*** by demonstrating a high standard of personal performance and conduct 1.2. Implement ***communication strategies*** to represent the organisation positively to media, local community and stakeholders

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ELEMENT	PERFORMANCE CRITERIA
	1.3. Make decisions in consultation with relevant stakeholders and relevant individuals where appropriate 1.4. Use a range of ***influencing strategies*** to increase commitment from staff and stakeholders to achieve organisational requirements and to contribute to desired culture 1.5. Undertake selected community and/or professional engagements that project a positive image of the organisation to the broader community and stakeholders
2. Cultivate new and existing partnerships with stakeholders	2.1. Establish outcomes to be achieved from a learning ***partnership*** 2.2. Analyse models for effective consultation and collaboration within a partnership 2.3. Cultivate ***collaborative communities*** and partnerships through application of a range of learning and communication solutions 2.4. Forge relationships, collaborative communities or partnerships between a ***training and assessment organisation*** and a ***public or private sector enterprise*** 2.5. Consult stakeholders to establish vocational education and training ***partnership learning programs***
3. Establish positive collaborative relationships	3.1. Establish processes that contribute to the creation and maintenance of a positive culture that embraces collaboration 3.2. Establish processes to ***resolve conflict in a fair, equitable and collaborative manner*** 3.3. Organise and allocate work activities in a cost effective and equitable manner with clear, quantifiable and agreed ***performance standards*** 3.4. Encourage staff to embrace a learning culture and to undertake activities that develop their personal competence and performance 3.5. Empower individuals to develop their own ways of working within agreed boundaries of competence, cultural, ***diversity*** and ***organisational and legal requirements*** 3.6. Establish ***indicators*** and ***feedback processes*** that can be used to evaluate the health of the work environment

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ELEMENT	PERFORMANCE CRITERIA
4. Lead establishment of a partnership program	4.1. Identify and address ***relevant organisational policies and procedures*** in partnership learning program plans 4.2. Identify and incorporate relevant legal requirements into planning of learning programs established in a community or partnership setting 4.3. Form partnership learning programs in collaborative and consultative processes involving public or private sector enterprises 4.4. Plan and allocate ***resource requirements*** to accomplish a partnership learning program 4.5. Establish relevant organisational policies and procedures relating to partnerships, and training and assessment services
5. Establish reporting mechanisms for partnership program	5.1. Establish ***reporting systems*** for ***reporting results***, that meet ***reporting requirements***, against planned partnership outcomes 5.2. Implement ***reporting systems*** to map learner progress against partnership outcomes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analysis and interpretation skills to:
  - evaluate organisational information management systems, policies and procedures
  - select relevant evaluation information and documentation
  - identify any potential and current non-compliance
  - access and interpret organisation's standards and values
  - analyse records or notes of the evaluation process
- initiative and enterprise skills to establish collaborative partnerships and relationships
- interpersonal and communication skills to negotiate, to question, to listen and investigate, to network and clarify issues
- planning and organising skills to:
  - research and evaluate validation processes, and to determine and implement

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REQUIRED SKILLS AND KNOWLEDGE
improvements to these processes • develop and establish agreement to plans • problem-solving skills to review feedback and to plan improvements • teamwork skills to lead and motivate a team in establishing productive networks, partnerships and other relationships.
Required knowledge
• relevant legislation that affects the business operation, especially in regard to OHS and environmental issues, equal opportunity and anti-discrimination, industrial relations • organisation mission, purpose and values • organisation objectives, plans and strategies • leadership styles • personal development planning methodologies • data collection methods • external environment scanning relating to social, political, economic and technological developments • emotional intelligence and its relationship to individual and team effectiveness • organisational transformation and the management of the stages of change • organisational design and building in responsiveness of operations to change in customer or market conditions.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated capacity to foster learning partnerships, conduct stakeholder consultation and use strategic and personally enhancing communication skills • developing collaborative approaches to enhance individual, team and organisational outcomes • initiating and implementing learning program partnerships in line with relevant regulatory, employment and organisational requirements

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EVIDENCE GUIDE	
	• knowledge of relevant policy, legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • competence is consistently demonstrated over time, and over a range and variety of situations • access to required assessment facilities and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of applied projects or learning activities, especially relating to formation of professional networks and stakeholder consultation in relation to forming partnerships for vocational education and training programs • direct observation of contextual application of skills • submission of a portfolio of evidence including previous work forging partnerships • oral or written questioning to assess knowledge of development of industry learning partnerships.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLED702A Lead learning strategy implementation • BSBLED707A Establish career development services • BSBLED709A Identify and communicate trends in career development • PSPMNGT614A Facilitate knowledge management.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating

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RANGE STATEMENT	
conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant individuals may include:	• employees • employers • government agencies and departments • learners/students • industry associations, employer bodies, professional associations • industry representatives • national Industry Skills Councils • people working in the roles targeted by training • regulatory and licensing authorities • research agencies • state/territory industry training advisory bodies • subject or technical specialists or experts • unions • universities
Stakeholders may include:	• administrative and regulatory bodies • coordinators, teachers, assessors, coaches, mentors and support staff • employees • industry, employee, employer, professional and peak bodies or associations • learners/students • other training and assessment organisations • public or private sector enterprise
Potential learners may include:	• apprentices and trainees • current or ongoing learners and clients • existing industry and enterprise employees • individuals changing careers • individuals learning new skills and knowledge • individuals or groups meeting licensing or other regulatory requirements • individuals seeking to upgrade competencies • individuals who are unemployed • individuals who have a disability • members of target groups such as Aboriginal and Torres Strait Islander communities

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RANGE STATEMENT	
	• overseas learners and international students • potential learners and clients • recent migrants and people from culturally and linguistically diverse backgrounds • school leavers, new entrants to the workforce
Communication strategies may include:	• conducting presentations • developing and applying interview and interpersonal communication protocols • developing and circulating marketing materials • developing promotional materials and course outlines • initiating and conducting a public communication strategy
Influencing strategies may include:	• debate • dialogue • discussion • formal and informal techniques • levels of participation • moderated negotiations • networking • strategies applied face-to-face or collectively (e.g. in a learning community or community of practice)
Partnerships may:	• be informal • be physical or virtual (e.g. online) • involve a formal agreement • involve one or more enterprises, and training and assessment organisations • involve one or more learning programs
Collaborative communities may include:	• communities of practice • formal or informal relationships • informal and formal groups in collaborative relationships • knowledge communities • knowledge networks • learning communities • physical or virtual relationships • supply chain communities • virtual circles
Training and assessment	• organisation that delivers non-recognised

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RANGE STATEMENT	
organisation may include:	vocational education and training • organisation working in a partnership arrangement with an RTO to deliver recognised vocational education and training • RTO delivering recognised vocational education and training services such as TAFE institutes, private commercial colleges and organisations, enterprises, community organisations, group training companies and secondary schools
Public or private sector enterprises may include:	• community bodies • government agencies • privately owned companies
Partnership learning program may include:	• accredited course which includes Training Package outcomes • community education program • nationally endorsed qualification from a Training Package or accredited course • part of a VET in Schools program • part of an apprenticeship or traineeship • professional development program • short course or non-recognised vocational program • short-term development plan • short-term induction program • subset of a learning strategy • traineeship or apprenticeship • workplace learning program
Resolving conflict in a fair, equitable and collaborative manner may include:	• adherence to relevant legislative, legal, workplace requirements • application of organisational complaints procedures • internal or external specialists
Performance standards may be based on:	• personal or task outcomes • span short- or long-term outcomes • strategic, operational outcomes
Diversity includes difference in:	• age • belief systems and values • culture • expertise, experience and working styles • gender

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RANGE STATEMENT	
	• interpersonal style • interests • language, literacy and numeracy • physical differences • politics • race • religion • sexual orientation • thinking and learning styles
Organisational and legal requirements may include:	• collaborative and partnership arrangement agreements such as memoranda of understanding • confidentiality and privacy requirements • licensing requirements • requirements for initial and continuing registration as defined in the AQTF Standards for Registered Training Organisations and state/territory legislation and regulations governing provider registration and course accreditation • requirements of awards and enterprise bargaining agreements • requirements of endorsed Training Packages • requirements of other relevant commonwealth and state/territory legislation, for example relating to matters such as OHS, anti-discrimination, workplace and industrial relations, workers compensation, apprenticeships and traineeships • requirements set by professional associations • requirements set by quality systems

Indicators may include:	• formal human resources and related indicators to provide benchmark, comparative measures on:
	  • average hours in relation to output per employee
	  • down-time
	  • related operational and planning indicators
	  • revenue per employee/team
	  • staff absenteeism
	  • staff satisfaction

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RANGE STATEMENT	
	• staff turnover • training hours
Feedback processes include:	• formal complaints or suggestions procedures • formal-informal • independent audits • management audits/workplace checks • surveys • virtual or physical • whistleblower policy

Relevant organisational policies and procedures may include:	• access and equity
	• assessment procedures and options
	• client services
	• confidentiality requirements
	• ethical standards
	• fees and payment schedule
	• grievance and appeals processes
	• learner selection, enrolment, induction and orientation procedures
	• mutual recognition obligations
	• policies and procedures being available to all personnel, learners, clients and candidates
	• staff recruitment, induction and ongoing development and monitoring
	• support services available
	• human resources policies and procedures and legal requirements including anti-discrimination, equal employment, OHS
	• administrative and records management systems, for example that relating to:
	  • contract manager
	  • document version control
	  • maintenance, retention, archiving, retrieval, storage and security of training and assessment information and records
	  • personnel responsible for analysing statistics and data to ensure organisation complies with relevant standards across all of its operations and training and assessment activities
	  • privacy and access to training and assessment information and records

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RANGE STATEMENT	
	• reporting and recording requirements and arrangements • supervisors and managers • union and employee representatives • users of training information such as finance personnel, human resources personnel, employers
Resource requirements may include:	• additional staff • distribution costs • equipment • production costs • promotional costs • research and development • re-tooling • staff training
Reporting systems for reporting results may include:	• arrangements for the issuing of Australian Qualifications Framework (AQF) qualifications and Statements of Attainment • arrangements for recognising and recording current competencies • electronic student management system which complies with AVETMISS or other reporting or statistical collection requirements • internal organisational recording and reporting systems • record keeping policies and procedures
Reporting results may include:	• Australian Apprenticeship Centre forms and letters such as for incentives and completions • availability of all reports and records for audit and monitoring purposes • enrolment forms • financial reporting for funding and payments from funding body • OHS incident reporting systems • performance agreements • reporting for apprenticeship and traineeship program delivery • reporting for in-house or internal program delivery • Training Contract and RTO notifications
Reporting requirements may	• AQTF Standards for Registered Training

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RANGE STATEMENT	
include those specified in:	Organisations • AVETMISS process documentation • organisational documentation

Reporting systems to map learner progress against partnership outcomes may include:	• electronic systems including those using business technology such as:
	  • computers
	  • hardware
	  • software
	  • telephone networks
	• physical systems such as face-to-face and print communications

Unit Sector(s)

Unit sector	

Competency field

Competency field	Stakeholder Relations - Relationship Management

Co-requisite units

Co-requisite units		

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BSBRES401A Analyse and present research information

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to gather, organise and present workplace information using available systems. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are required to apply their broad knowledge of the work environment to analysis and research tasks. They may have responsibility to provide guidance or to delegate aspects of these tasks to others.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Gather and organise information	1.1. Gather and organise ***information*** in a format suitable for analysis, interpretation and dissemination in accordance with ***organisational requirements*** 1.2. Access information held by the organisation ensuring accuracy and relevance in line with established organisational requirements 1.3. Ensure that ***methods of collecting information*** are reliable and make efficient use of resources in accordance with organisational requirements 1.4. Identify research requirements for combining online research with non-electronic sources of information 1.5. Use ***business technology*** to access, organise and monitor information in accordance with organisational requirements 1.6. Update, modify, maintain and store information, in accordance with organisational requirements
2. Research and analyse information	2.1. Clearly define ***objectives of research*** ensuring consistency with organisational requirements 2.2. Ensure that data and ***research strategies*** used are valid and relevant to the requirements of the research and make efficient use of available resources 2.3. Identify ***key words and phrases*** for use as part of any online search strategy, including the use of ***Boolean operators*** and other search tools

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ELEMENT	PERFORMANCE CRITERIA
	2.4. Use reliable ***methods of data analysis*** that are suitable to research purposes 2.5. Ensure that assumptions and conclusions used in analyses are clear, justified, supported by evidence and consistent with research and ***business objectives***
3. Present information	3.1. Present recommendations and issues in an appropriate format, style and structure using suitable business technology 3.2. Structure and format reports in a clear manner that conforms to organisational requirements 3.3. Report and distribute research findings in accordance with organisational requirements 3.4. Obtain ***feedback*** and comments on suitability and sufficiency of findings in accordance with organisational requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to read, write and understand a variety of texts; and to edit and proofread documents to ensure clarity of meaning, accuracy and consistency of information
- problem-solving skills to deal with information which is contradictory, ambiguous, inconsistent or inadequate
- technology skills to select and use technology appropriate to a task
- research skills to identify and access information.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety (OHS)
- organisational record keeping/filing systems, security procedures and safe

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REQUIRED SKILLS AND KNOWLEDGE
recording practices • organisational policies and procedures relating to distribution of workplace information, and legal and ethical obligations • research processes and strategies to identify new sources (online and print) of information and to use them most efficiently and effectively.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • presenting information and data • maintaining and handling data and documents systematically • analysing and interpreting data to support organisational activities • knowledge of research processes and strategies to identify new sources of information.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of research tasks and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of presentations • review of documentation outlining recommendations and issues

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EVIDENCE GUIDE	
	• review of reports outlining research findings.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • general administration units • IT use units • Governance units

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information may include:	• demographic data • service delivery records • computer databases (library catalogue, customer records, subscription database, internet) • computer files (letters, memos and other documents) • correspondence (faxes, memos, letters, email) • financial figures • forms (insurance forms, membership forms) • information on training needs • invoices (from suppliers, to debtors) • marketing reports/plans/budgets • personnel records (personal details, salary rates) • production targets • sales records (monthly forecasts, targets achieved)
Organisational requirements may include:	• anti-discrimination and related policy • business and performance plans • Code of Conduct/Code of Ethics

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RANGE STATEMENT	
	• defined resource parameters • ethical standards • goals, objectives, plans, systems and processes • information protocols • legal and organisational policies, guidelines and requirements • management and accountability channels • OHS policies, procedures and programs • procedures for updating records • quality assurance and/or procedures manuals • security and confidentiality requirements
Methods of collecting information may include:	• checking research provided by others • checking written material including referrals and client files • individual research • information from other organisations • interviews with community members, colleagues/customers • observation and listening • previous file records • questioning (in person or indirect) • recruitment applications and other forms
Business technology may include:	• answering machine • computer • fax machine • photocopier • telephone
Objectives of research may include:	• comparative analysis • hypothesis testing • identification of trends • industry pricing policies • process mapping • situational diagnosis
Research strategies may include:	• data analysis • documentation reviews • focus groups • interviewing colleagues and clients • online searching • product sampling • subscription databases

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RANGE STATEMENT	
Key words and phrases may include:	• American spellings when searching online • cultural or geographic terms • using different thesauri in different databases
Boolean operators may include:	• exclude - / NOT • include +/ AND • or • phrase searching " "/( ) • variations, depending on the resource being used
Methods of data analysis may include:	• data sampling • feedback on results • peer review • review of previous research • statistical analysis
Business objectives may include:	• community capacity building • community development • service provision • business planning • financial performance • flexibility, responsiveness • interpersonal communication • marketing and customer service • organisational values and behaviours • people management • work procedures and quality assurance manuals
Feedback may include:	• audit documentation and reports • comments from community, board members, clients and colleagues • customer satisfaction questionnaires • quality assurance data • returned goods

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Knowledge Management - Research

Co-requisite units

Co-requisite units		

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BSBRES404A Research legal information using primary sources

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to work under supervision researching primary sources of legal information, locating relevant information and writing up a basic summary. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who provide legal support services while under supervision. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Receive and process request for information	1.1. Document ***request*** using ***appropriate recording system*** 1.2. Confirm client identity and other party's right to receive information 1.3. Clarify client needs and establish relevant criteria in consultation with ***designated person*** to ensure client needs are met 1.4. Research and identify ***appropriate response methods*** and ***format*** 1.5. Forward request for information to others where appropriate
2. Identify information sources	2.1. Identify and research ***relevant sources*** and locations of information 2.2. Obtain access to identified sources 2.3. Resolve problems with accessing information promptly and efficiently
3. Prepare to extract information	3.1. Locate and extract information relevant to particular request 3.2. Discuss and implement resolutions to problems in accessing information with designated person where appropriate 3.3. Copy extracted information according to ***organisation's security and confidentiality***

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ELEMENT	PERFORMANCE CRITERIA
	procedures 3.4. Maintain ***integrity of content***/information
4. Ensure information meets request	4.1. Analyse, evaluate and edit extracted information to fit client needs 4.2. Combine ***different types of information***, where appropriate, to provide response to request
5. Compose report or correspondence	5.1. Develop plan and synopsis for report or correspondence 5.2. Write report or correspondence using clear and concise language 5.3. Check spelling, punctuation and grammar, and amend where necessary
6. Prepare to format report or correspondence	6.1. Format report or correspondence according to ***organisation's requirements***, ***policies and procedures*** 6.2. Check report or correspondence for accuracy and to ensure that intended meaning will be readily understood by recipient
7. Finalise report or correspondence	7.1. Arrange review and sign-off of report or correspondence with designated person within designated timelines 7.2. Apply ***organisation's information-recording procedures*** 7.3. Forward report or correspondence to client

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication skills to provide clear and specific instructions about required information
• literacy skills to:
  • follow complex legal procedures
  • consider aspects of context, purpose and audience when generating and formatting texts
  • edit and proofread documents to ensure clarity of meaning, accuracy and

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REQUIRED SKILLS AND KNOWLEDGE
conformity to organisational requirements • numeracy skills to collate and present data, graphs and annotated references • organisational skills to select and apply the procedures and strategies needed to perform a range of tasks within designated timelines • problem-solving skills to use processes flexibly and interchangeably • research skills to locate specific information • technology skills to use a range of software applications
Required knowledge

• organisation's required policies and procedures for the full range of tasks covered
• legal terminology in relation to area of law and relevant legal process
• relevant state, territory and commonwealth legislation, rules, regulations and codes in relation to client and firm, including:
  • copyright and intellectual property
  • freedom of information
  • Privacy Act
• accepted codes of practice relevant to the organisation, including those relating to:
  • privacy and confidentiality
  • use of company property
  • duty of care
  • ethical behaviour
  • non-discriminatory practice
  • conflict of interest

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • locate and provide appropriate information, which meets client needs and is in required format • adhere to relevant codes of practice, in particular those relating to privacy and confidentiality • provide materials that meet organisation's policies and

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EVIDENCE GUIDE	
	procedures • demonstrate knowledge of relevant legislation, rules, regulations, codes of practice and research resources.
Context of and specific resources for assessment	Assessment must ensure access to: • an actual workplace or simulated environment • appropriate legislation and regulations relevant to common legal matters • workplace manuals and reference materials, such as company policies, procedural manuals and checklists • list of relevant sources of documentation and sample forms • background information on courts, their jurisdiction and behavioural requirements • appropriate technology, such as computers with relevant software • appropriate texts and people with expert knowledge, such as legal practitioners • appropriate legislation and regulations relevant to common legal matters.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • observation of role plays • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • review of report or correspondence compiled in response to client request and its formatting • evaluation of how organisation's information-recording procedures have been applied • oral or written questioning to assess knowledge of accepted codes of practice relevant to the workplace.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBLEG413A Identify and apply the legal framework • BSBLEG414A Establish and maintain a file in legal services.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Request for information may come from:	• barrister • external client • internal staff • other parties • staff from another office.
Appropriate recording system may be:	• electronic • paper-based.
Designated person may include:	• external client • external official • lawyer • legal practice manager • partner • supervisor.
Appropriate response methods may include:	• providing letters and reports • sending copies of original information • sending original information.
Appropriate format may include:	• completion of proforma • photocopies • preparation of original documents.

Relevant sources of information may be online or hard copy and may include:	• agreements
	• articles, including:
	  • academic
	  • journal
	  • newspaper
	• briefs
	• client files
	• closed matter files
	• financial information, including:
	  • commonwealth, state and territory
	  • international
	  • specific to another organisation

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RANGE STATEMENT	

	• specific to organisation
	• internal correspondence
	• letters, including opinion letters
	• market research information
	• media, including:
	  • audio
	  • television
	  • video
	• memorandums of law
	• non-legal reports
	• original research
	• libraries
	• pleadings
	• precedents
	• previous case histories and common law
	• relevant legislation
	• specialist texts
	• statistics
	• transcripts from supervisor's notes.

Organisation's security and confidentiality procedures may relate to non-disclosable information and may include:	• addresses • court dates • fees • other clients • health status • legal history • personal history.
Integrity of content may include:	• completeness • neatness • order of pages.
Different types of information may include:	• certificates • correspondence • entitlements • legislation • reports.
Organisation's requirements for document formatting may include:	• appropriate use of letterhead • correct line spacing • correct margins • correct use of reference • dual column system

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RANGE STATEMENT	
	• list of enclosures • paragraph numbering • placing of headings • presence or absence of a back sheet • presence or absence of a cover sheet • specific sign-off clauses • table of contents • use of font features • use of document headers and footers.
Organisation's policies and procedures may include:	• customer service protocols • document recording procedures • format of report or correspondence • information sources • protocols for accommodating specific client needs, e.g. case manager, social worker, parole officer, translator or interpreter • recording information • security, confidentiality and privacy procedures • verifying and authorising information.
Organisation's information-recording procedures may include:	• attaching file name and matter number • ensuring client file is updated • maintaining time records • storing and securing copy.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge management - research

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Co-requisite units

Co-requisite units		

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BSBRES502A Research legal information using secondary sources

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake legal research using secondary sources and under supervision. This includes identifying research requirements and sources of information, applying information to a set of facts, evaluating the quality of the information, and preparing and producing reports. A range of legislation, rules, regulations and codes of practice may apply to this unit at the time of endorsement, depending on job roles and jurisdictions.

Application of the Unit

Application of the unit	This unit applies to individuals who apply a well established, sound theoretical knowledge base in performing a range of research tasks and preparing a range of reports in a legal context. Its application in the workplace will be determined by the job role of the individual and the legislation, rules, regulations and codes of practice relevant to different jurisdictions.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify specific legal data and information requirements	1.1. Liaise with ***designated person*** to clarify specific legal data and information needs 1.2. Prepare research plan and prioritise activities 1.3. Identify ***resources and technical requirements*** 1.4. Assign timelines to tasks and delegate tasks where appropriate
2. Undertake research	2.1. Identify ***sources of legal data and information*** 2.2. Research and identify key information to be extracted
3. Review research	3.1. Check information to ensure that extracted details are acknowledged and recorded for copyright and other legal requirements 3.2. Analyse legal data and information for relevance to facts 3.3. Edit and collate legal data and information to fit

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ELEMENT	PERFORMANCE CRITERIA
	research and relevant legal and ethical requirements
4. Prepare drafts	4.1. Draft document in appropriate format taking into account precedent documents and using ***appropriate language***
	4.2. Present legal data and information according to ***organisation's policies and procedures*** and legal requirements
	4.3. Evaluate draft against previously identified criteria and take action to address identified gaps or deficits
	4.4. Liaise with supervisor to review document
	4.5. Make amendments where necessary
5. Prepare final draft	5.1. Identify key points and prepare executive summary, where appropriate
	5.2. Prepare ***appendices***, bibliography and table of contents as required
	5.3. Check final draft and present it to supervisor for review and sign-off
	5.4. Make arrangements to disseminate ***report*** as required

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - provide clear instructions to others
  - clarify, explore and build on ideas in discussions
  - question others
- literacy skills to:
  - read and critically evaluate intricate legal documents
  - use legal vocabulary and grammatical structures to achieve precise meaning
  - draft, edit and proofread reports
- numeracy skills to:
  - collate documents
  - accurately record documents

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REQUIRED SKILLS AND KNOWLEDGE
• analyse and present statistical data • analytical skills to evaluate legal data and information
Required knowledge

• scope of own role andresponsibilities and obligations to refer to supervisor matters in relation to legal advice, completion or sign-off on legal work as described by relevant jurisdictions
• organisation's policies and procedures relating to accessing and using legal information
• accepted codes of conduct, including those relating to:
  • privacy and confidentiality
  • use of company property
  • duty of care
  • ethical behaviour
  • non-discriminatory practice
  • conflict of interest
  • compliance with reasonable direction
• format for presenting written and oral reports and appendices
• legal terminology
• sources of legal data and information
• relevant court processes, current legislation, legal processes and required documentation

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • conduct effective research using secondary sources according to identified information requirements and organisation's policy, procedures and legislative requirements • draft documents in appropriate formats and language, according to the requirements of the request and within agreed timelines • regularly and effectively communicate with designated person

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EVIDENCE GUIDE	
	and relevant others regarding all activities, actions and outcomes • apply knowledge of relevant court processes, current legislation, legal processes and required documentation.
Context of and specific resources for assessment	Assessment must ensure access to: • an actual workplace or simulated environment • appropriate legislation and regulations relevant to common legal matters • workplace manuals and reference materials, such as company policies, procedural manuals, checklists, documentation and sample forms • background information on courts, their jurisdiction and behavioural requirements • appropriate technology, such as computers with relevant software • appropriate texts and people with expert knowledge, such as legal practitioners • secondary research sources for legal matters.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of examples of research reports that have used secondary sources • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • observation of role plays • review of research proposal or brief and plan • evaluation of timelines assigned to tasks • review of draft document • review of executive summary • oral or written questioning to assess knowledge of sources of legal data and information.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Designated person may include:	• barrister • external client • government official • qualified legal practitioner • supervisor.
Resources and technical requirements may include access to:	• computers • experts • legal precedent bank • legislation • office equipment and supplies • online legal information services • rooms • staff.
Sources of legal data and information may include:	• court library • government publisher • internet • online information services, including case law • organisation's library • precedent bank • specialist texts.
Appropriate language may include:	• academic language • legal language • plain language • technical language.
Organisation's policies and procedures may include:	• information sources • recording information • report format • security, confidentiality and privacy procedures • time-recording procedures • verifying and authorising information.
Appendices may include:	• certificates stamped as true and correct • photos stamped as true and correct.

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RANGE STATEMENT	
Report may include:	• financial report • marketing report • report discussing change in legislation and/or new legislation • report for journal or presentation at a conference or seminar • report of work undertaken • report on relevant case law and/or legislation applicable to legal problem.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge management - research

Co-requisite units

Co-requisite units		

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BSBRES801A Initiate and lead applied research

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan, conduct and report on applied research to influence strategic practices and outcomes within an organisational context. The unit also covers constructing an applied research strategy, using a range of applied research techniques, and analysing and presenting findings. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to leaders or managers using applied research to ensure learning can enhance individual, team and organisational performance. The intended purpose and approach to applied research may vary across a range of contexts and organisations. In this unit, the focus is on applied research to attain improved organisational outcomes. It involves leading a range research activities and techniques that, in combination, can provide quality information to enhance learning related activities and the development of capabilities.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Construct an applied research strategy	1.1. Clarify and confirm ***applied research purpose*** and needs of the ***target group***
	1.2. Determine policies and procedures in relation to conducting applied research
	1.3. Establish mechanisms for collecting and maintaining data in a systematic manner
	1.4. Analyse ***factors affecting the reliability and validity of data***
	1.5. Review relevant research ethics and codes of conduct
	1.6. Prepare ***applied research strategy*** and ***hypothesis***
	1.7. Frame a research strategy in consideration of available ***tools*** and ***resources***

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ELEMENT	PERFORMANCE CRITERIA
2. Use a range of applied research techniques	2.1. Review and evaluate a range of ***applied research methods***, ***theories*** and ***data collection techniques*** 2.2. Select appropriate methods to gather and analyse data 2.3. Use, as appropriate, ***suitable technology*** and technology services to support data collection and analysis 2.4. Access ***appropriate sources of information*** and ***contributors*** relevant to the research 2.5. Optimise ***relevance of the research*** through integrity of the data collected and analysis tools used
3. Analyse and present findings	3.1. Evaluate how research findings such as trends and changes will impact on learning strategy 3.2. Review data and research findings for accuracy of details and adherence to any ***legal requirements*** 3.3. Collate and analyse data for relevance against the original applied research strategy 3.4. Document and ***present research findings*** in a clear and logical manner consistent with audience needs 3.5. Identify the need for and an appropriate approach to, further research

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and teamwork skills to:
  - analyse and interpret structurally intricate information in the area being researched
  - consult with target groups using a range of communication techniques
  - develop written texts which deal with complex ideas and concepts
  - present research results creatively to meet audience needs
- initiative and enterprise skills to discover and source appropriate information, and to identify future implication of information and data collected
- planning and organising skills to:
  - construct an applied research strategy

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REQUIRED SKILLS AND KNOWLEDGE

• initiate and design research methodology
• manage an applied research project
• frame research strategy in consideration of available resources
• problem-solving skills to:
  • develop and examine the validity of the hypothesis using a range of applied research techniques
  • collect, organise, analyse and present data
  • analyse research
  • check the integrity of data collected
  • conduct trend analyses
• self-management and learning skills to:
  • manage own time and determine priorities
  • review and adhere to relevant ethics and codes of conduct
  • store data to maintain privacy and confidentiality of information
  • conduct research to develop capabilities and learning related activities
• technical skills to:
  • select suitable technology and technical services
  • use a range of software programs
  • use technology and the internet to discover, access, collect and store data, information and research in a systematic manner.

Required knowledge
• communication processes and methods • data collection methods • legislation, regulations, policies, procedures and guidelines relating to handling or storing data, including privacy and freedom of information • presentation techniques • reporting methods • research ethics and codes of conduct • research tools and methods • selection of appropriate applied research techniques.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• formulating a research proposal or plan which includes:
	  • specific research questions or hypotheses
	  • valid population or sample size
	  • description of the geographical, cultural, social or institutional context within which the research will be carried out
	  • full description of the data collection methods
	  • analysis of the limitations to research design
	• designing an applied research project using appropriate tools and techniques
	• research report with analysis of data, and valid and reliable findings
	• utility and relevance of the research results
	• knowledge of applied research techniques.

Context of and specific resources for assessment	Assessment must ensure: • research activity relates to an actual workplace or simulated context and topic • competence is consistently demonstrated over time, over a range of applied topics, and using a range of tools and techniques appropriate to the given situations and research topic.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • applied projects or assessment activities relating to conducting applied research • observation of contextual application of skills • oral or written questioning to assess knowledge of applied research.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended,

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EVIDENCE GUIDE	
	for example: • BSBITB701A Implement advanced electronic technologies • BSBLED702A Lead learning strategy implementation • BSBLED703A Implement improved learning practice • BSBLED704A Review enterprise e-learning systems and solutions implementation • BSBLED709A Identify and communicate trends in career development.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Applied research purpose may be contained in documents such as:	• agreements • research brief • research contracts • research guidelines • research statement
Target group may include:	• age cohort • career choices • cultural background and needs • diversity • employees • employment status or role • end users • learners/students • learning styles and preferences • level of education achieved • literacy and numeracy skills • location

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RANGE STATEMENT	
	• occupational health and safety • predetermined service user group • skill or competency profile • socioeconomic background
Applied research strategy may cover:	• analysis of industry specific trends, statistics and issues • collection of data to assist informed decision making, planning or risk management • data and information relating to strategy, policy, practices, or work processes developed and implemented by an organisation • formation of solutions to complex problems • information and analysis needed to develop a campaign, strategic plan, industry or sector plan and strategy, or to bargain effectively with employers • information and analysis to conduct a strategic or community campaign or activity • relationship or relevance of a theory, principle or practice to an immediate practical problem, issue or to test a proposed solution
Factors affecting reliability and validity may include:	• sample size • type or survey used (e.g. comparing types and methods to increase validity) • capacity to generalise findings across the whole population • access appropriate population
Hypothesis is:	• conceptual or operational proposition or explanation that will be tested through the conduct of the applied research
Tools may be:	• designed for electronic or physical presentation • involve a range of technologies (online or computer-based)
Resources may include:	• components required • design specifications • infrastructure • monetary • physical • technical manuals • samples
Applied research methods and	• methods such as:

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RANGE STATEMENT	
theories may cover:	• action research • case study • classification • experience and intuition • experiments • interviews • map making • mathematical models and simulations • participant observation • physical traces analysis • semiotics • surveys • statistical data analysis • statistical surveys • ethnographic research • content, textual analysis, theories and techniques, which will vary upon consideration of: • application of statistical methods • causal factors and dependant or independent variables • critical analysis • experimental, quasi-experimental, non-experimental • mathematical calculations • problem solving • qualitative or quantitative research • sampling and sample size
Data collection techniques may include:	• collaboration with other experts or mentors • desk research • document research • field study • observation • physical items analysis • interviews • questionnaires • surveys
Suitable technology may include:	• communication technology and networks • databases and the use of spreadsheets, graphs,

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RANGE STATEMENT	
	trend and time series, and mathematical equations • hardware and software
Appropriate sources of information may include:	• archives • community organisations • computer data, including internet • discussions with current industry practitioners • discussions with industry personnel, manufacturers, and technical and sales personnel • government departments • industry associations and organisations • industry journals • libraries (such as text, film, video, sound, graphic) • media (such as film, television, radio, newspapers, multimedia) • media archives • museums, galleries • organisational policies, procedures and journals • personal observations and experience • professional organisations • reference books • technical publications, manuals
Contributors may include:	• individuals and groups both inside and outside the organisation who have some direct interest or expertise in relation to the applied research or who provide data
Relevance of the research may be based on:	• available time and resources • feasibility of implementing the recommendations • findings of previous and current research • original research parameters and brief • quality and credibility of the methodology • value of its usefulness • value of the information and data
Legal requirements may include:	• agreements with third parties that supply research or data • competency standards • contracts • copyright and privacy laws relating to physical

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RANGE STATEMENT	
	materials and electronic technology • licensing • plagiarism • privacy • relevant commonwealth and state/territory legislation, policy, codes of practice and national standards • security of information
Presenting research findings may include:	• circulating publications for comment and critique on the internet • contributing to strategic policy • drafting publications or reports • presentations at seminars and conferences • providing data, plans, specifications and reports resulting in changed work practice/s or design/s • providing internal reports verbally, in writing or via presentations • publishing papers and articles for expert review and audiences • publishing reports and articles for lay audiences

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Research

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBRKG301B Control records

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to classify, register, and track records and information about records within a business or records system. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals requiring some understanding of relevant theoretical knowledge relating to recordkeeping functions. It is not assumed that individuals at this level would have responsibility for supervising the work of others; however it is assumed that as a recordkeeping practitioner their work will support effective recordkeeping and governance practices across the organisation. The application is in relation to business or records systems that provide guidelines and processes to assist users in making judgements on record status and classification, and should be performed under supervision or in consultation with more senior staff or users of the system.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify records for capture	1.1. ***Categorise*** incoming material and identify ***records***, ***metadata*** and formats for capture 1.2. Assess incoming material against organisational checklist for determining what material needs to be captured 1.3. Deal with material which does not need to be registered 1.4. Locate, remove or copy record, when action is complete, from the active ***business or records system***
2. Classify records	2.1. Match identified transaction, action or activity documented by records to organisation's classification scheme 2.2. Select full classification and sentencing of records in accordance with the system's rules and organisational

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ELEMENT	PERFORMANCE CRITERIA
	procedures 2.3. Link classified or sentenced records to other records in business or records system 2.4. Select indexing points (cross reference terms) for records in accordance with system's rules and organisational procedures
3. Register records	3.1. Select and record unique identifiers for records in accordance with business or records system ***rules and procedures*** 3.2. ***Register*** records into business or records system 3.3. Document and forward records to appropriate locations or officers, observing any ***special handling requirements*** of the record format
4. Track records	4.1. Determine unique identifiers of records from requests or instructions 4.2. Obtain ***storage location***, history and information of records from business or records system 4.3. ***Update and amend*** information about records 4.4. Complete all ***transactions*** within designated timeframes 4.5. Complete and obtain appropriate ***documentation or reports***
5. Audit records	5.1. Locate records with action officer and in storage areas, in accordance with supervisor's instructions 5.2. Audit records against predetermined ***criteria*** in accordance with organisational procedures and quality program 5.3. Document and report any discrepancies

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to explain and clarify procedures, and to receive and interpret requests for records • literacy skills to read and interpret nature of record content

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REQUIRED SKILLS AND KNOWLEDGE
• problem-solving and analysis skills to interpret and apply descriptive standards • self management skills to accurately record metadata.
Required knowledge

• key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect aspects of business operations, such as:
  • AS 5044.1:2002 AGLS Metadata element set
  • AS 5090:2003 Work process analysis for recordkeeping
  • AS ISO 15489:2004 Records management
  • AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  • Australian Stock Exchange(ASX) Principles of Good Corporate Governance
  • ethical principles
  • codes of practice
  • privacy and freedom of information
  • archives and records legislation
  • occupational health and safety
• general principles and processes of records management and records management systems such as:
  • systems of control
  • records continuum theory
  • mandate and ownership of business process
• organisational business functions, structure and culture
• organisational policies, strategies and procedures, particularly those relating to records access and security.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • registering and tracking the location of records using

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EVIDENCE GUIDE	
	appropriate processes for capture and classification • identifying activities documented by records • applying classifications schemes • recording metadata accurately.
Context of and specific resources for assessment	Assessment must ensure: • access to examples records, recordkeeping systems and policies • access to workplace reference materials such as procedural manuals and company policies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • oral or written questioning to assess knowledge of general principles and processes of recordkeeping systems.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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RANGE STATEMENT	
Categorising records may include:	• determining storage locations • environmental context - business environments, community expectations, governance frameworks, legislative and regulatory mandates or relevant recordkeeping principles and standards • identifying areas or officers to which records are forwarded • modifying formats or media of record in line with organisational requirements • using organisational checklists of materials for capture • taking action on records which do not require registering, including in relation to records for immediate destruction • validating the authenticity, integrity, reliability and useability of records

Records may include:	• different stages of use:
	  • active
	  • archival
	• digital:
	  • remote drives
	  • servers
	  • CDs
	  • DVDs
	  • imaging systems
	  • PC-based applications
	  • mainframe
	• physical:
	  • audio-visual or multimedia
	  • graphic
	  • microform
	  • paper-based (acid free or multiple copies)
	• variety of sources:
	  • already in the custody of the organisation
	  • in the process of being transferred between organisations

Metadata are those records which are maintained about the records themselves and may include:	• activity classification terms • date, time, and location of record creation or registration into the system

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RANGE STATEMENT	
	• identity of record creator • indexing and descriptive terms • record format • security and access information • unique identifiers for each record

Business or records systems may include:	• archival control systems
	• business systems
	• cash register-based systems
	• characteristics relating to:
	  • aggregations
	  • context
	  • entities
	  • metadata
	• current business or records systems
	• electronic records and document management system (ERDMS)
	• informal
	• paper-based accumulation and card systems
	• PC-based accounting systems, employee and tax records systems
	• proprietary recordkeeping package
	• storage facilities systems

Rules and procedures may relate to:	• classification • destruction • manually generated running numbers • ownership • responsibility • system generated identifiers • transfer of custody

Registering records may include:	• access and security status:
	  • confidential
	  • high-security (restricted)
	  • open
	• description
	• details of record creator
	• disposal class and use including:
	  • conversion to other record formats
	  • destruction
	  • retention

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RANGE STATEMENT	
	• transfer • immediate location • other control information to fulfil system requirements • physical dependencies or format of a record that will assist with its management over time • title

Special handling requirements may include:	• secondary storage requirements
	• back-up and recovery procedures
	• migration requirements, which may include:
	  • superseded media formats
	  • format which may deteriorate over time

Storage location may include:	• digital:
	  • remote drives
	  • servers
	  • CDs
	  • imaging systems
	• physical:
	  • centralised or decentralised
	  • commercial storage service or government repository
	  • in-house or outsourced
	  • microform
	  • offline or off-site

Updating and amending information may derive from:	• action officers • file transfer slips • requests • results of quality assurance audit • supervisor • user

Transactions may include:	• transfer of records
	• disposal
	• reporting
	• auditing, which may address:
	  • compliance with recordkeeping metadata standards or requirements
	  • content
	  • location
	  • titling

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RANGE STATEMENT	
	• disposal
Documentation or reports may include:	• daily correspondence • over due action reports • proof of receipt • record of movement • resubmits for following day • statistics
Criteria for audit may include:	• compliance with recordkeeping metadata standards/requirements • content • location • titling • unique identifier

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRKG302B Undertake disposal

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify which records are subject to a disposal program, and to safely and securely transfer or dispose of the records. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals requiring some understanding of relevant theoretical knowledge relating to recordkeeping functions. It is not assumed that individuals at this level would have responsibility for supervising the work of others; however it is assumed that as a recordkeeping practitioner their work will support effective recordkeeping and governance practices across the organisation. The application is in relation to the disposal of records from an existing business or records system that has guidelines and processes to assist in making judgements on the status and classification of records. These judgements should be performed under supervision or in consultation with more senior staff or users of the system.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Conduct a records survey	1.1. ***Inform users*** of the ***business or records system***, about the ***records survey*** to be conducted, encouraging cooperation and input in ***identifying and assessing records*** and ***formats*** for disposal 1.2. Gather required ***data about records*** in accordance with the predetermined methodology and user requirements 1.3. Assess records to determine ***disposal status*** 1.4. Present findings of survey to inform users of proposed disposal processes and requirements 1.5. Undertake quality control measures in accordance with organisational procedures, to ensure consistency in determining disposal status and retention periods
2. Undertake disposal	2.1. Seek ***approval*** from appropriate individual/body for

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ELEMENT	PERFORMANCE CRITERIA
actions	***disposal*** actions 2.2. Destroy records which are no longer required for any purpose, in accordance with approval and organisational procedures 2.3. ***Store records*** which need to be kept for a further period, in accordance with legal obligations and organisational records storage requirements 2.4. Store original vital records, and copies of vital records where applicable, in accordance with organisational procedures and vital records strategy 2.5. Record and authorise all disposal actions in accordance with legal obligations, organisational procedures and business or records system rules
3. Maintain control of records	3.1. Prepare disposal documentation by recording the unique identifiers of the records to be disposed of in a form compliant with organisational rules and procedures for the ***transfer*** of custody, ownership and/or responsibility, or destruction of records 3.2. Prepare records for transfer for movement in accordance with storage medium requirements 3.3. Retain ***identifying documentation*** for transfer as part of organisational records and forward a copy to the recipient 3.4. Document transit locations for records to be moved in the location control system, where applicable 3.5. Maintain identifying documentation for destroyed records as part of organisational records where appropriate
4. Transfer records	4.1. Determine method, timeframe and personnel to undertake the movement in accordance with the organisational procedures and record requirements 4.2. Document relocation of records in the location control system and other systems, in accordance with organisational procedures 4.3. Complete and document the movement of records in accordance with the organisational procedures 4.4. Obtain proof of receipt and forward to appropriate authority where it is required
5. Destroy records	5.1. Determine method, timeframe and personnel to undertake the destruction, in accordance with organisational procedures and record requirements 5.2. Document destruction of records in the location

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ELEMENT	PERFORMANCE CRITERIA
	control system and other systems, in accordance with organisational procedures 5.3. Complete and document destruction of records in accordance with legal requirements and organisational procedures 5.4. Destroy records under secure conditions

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to explain and clarify procedures, and to consult with users of a records or business system
- literacy skills to read and interpret nature of record content
- problem-solving and analysis skills to interpret and apply rules affecting disposal of records
- self-management skills to accurately record metadata.

Required knowledge

- key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect aspects of business operations, such as:
  - AS 5044.1:2002 AGLS Metadata element set
  - AS 5090:2003 Work process analysis for recordkeeping
  - AS ISO 15489:2004 Records management
  - AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  - Australian Stock Exchange(ASX) Principles of Good Corporate Governance
  - ethical principles
  - codes of practice
  - privacy and freedom of information
  - archives and records legislation
  - occupational health and safety
- general principles and processes of records management and records management systems such as:
  - systems of control

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REQUIRED SKILLS AND KNOWLEDGE
• records continuum theory • mandate and ownership of business process • organisational business functions, structure and culture • organisational policies, strategies and procedures and tools particularly those relating to description, disposal and storage of records.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • assessing records to identify disposal status • recording and controlling processes as part of a disposal program • knowledge of relevant legislation, regulations, standards.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated work environment • access to office equipment and resources • access to examples of records, recordkeeping systems and policies • access to workplace reference materials such as procedural manuals and company policies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the

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EVIDENCE GUIDE	
	workplace or training environment • oral or written questioning to assess knowledge of general principles and processes of recordkeeping systems.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Informing users may include:	• access to staff meetings • email • legal or regulatory requirement • minute or memorandum • noticeboards • organisation-wide publications • personal visit • phone call
Users may include:	• action officer • external organisation • manager of an operational area or section • more experienced colleague or someone familiar with the area • supervisor
Business or records systems may include:	• archival control systems • business systems • cash register-based systems • characteristics relating to: • aggregations

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RANGE STATEMENT	
	• context • entities • metadata • current business or records systems • electronic records and document management system (ERDMS) • informal • paper-based accumulation and card systems • PC-based accounting systems, employee and tax records systems • proprietary recordkeeping package • storage facilities systems
Records may include:	• different stages of use: • active • archival • digital: • remote drives • servers • CDs • DVDs • imaging systems • PC-based applications • mainframe • physical: • audio-visual or multimedia • graphic • microform • paper-based (acid free or multiple copies • variety of sources: • already in the custody of the organisation • in the process of being transferred between organisations
Records survey may be undertaken to:	• add to corporate memory • analyse functions of authorities • aid disaster recovery and critical records planning • identify discovery order • respond to Freedom of Information request • gather general statistics

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RANGE STATEMENT	
	• identify records regularly required for transfer • locate time expired records • prepare retention and disposal schedules • respond to a requirement for repository or storage planning • review a variety of business or records systems • transfer or destroy records • respond to a user satisfaction survey

Identifying and assessing records may include:	• applying criteria for vital records, to which specific criteria apply, or which document:
	  • legal liabilities
	  • ownership rights or entitlements
	  • policy records/precedent decisions
	  • rights or entitlements of individuals
	• consulting identifying documentation found in:
	  • databases
	  • lists
	  • notes about the records
	  • proforma
	• consulting retention and disposal schedules which may be:
	  • continuing
	  • functional
	  • general
	  • multiple
	  • one-time
	  • single
	• environmental context - business environments, community expectations, governance frameworks, legislative and regulatory mandates or relevant recordkeeping principles and standards
	• identifying:
	  • access restrictions
	  • any extenuating impediments to the destruction
	  • how information is likely to be presented and manipulated
	  • how information is to be retrieved
	  • how many people will need to retrieve the

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RANGE STATEMENT	
	information • what information is needed
Formats may include:	• audio-visual or multimedia formats • electronic • graphic • mainframe • microform • paper-based (acid free or multiple copies) • PC-based applications

Data about records may include:	• documentation relating to:
	  • authenticity
	  • integrity
	  • reliability
	  • social or business activities
	  • useability
	• record's:
	  • arrangement
	  • condition
	  • creator
	  • date range
	  • format
	  • frequency of use
	  • function
	  • location
	  • owner
	  • quantity
	  • series title
	• whether or not data has been captured into a business or records system
	• whether or not there is a retention and disposal schedule

Disposal status may include:	• disposal actions • records requiring sentencing or review • records requiring appraisal (where no disposal authority exists)
Approval may include permission for transfer of archival records from:	• archival authority • own organisation • receiving organisation

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RANGE STATEMENT	
Disposal may be:	• outsourced • undertaken by movement, permanent transfer, loan or destruction • undertaken by the organisation

Storing records may include:	• digital:
	  • remote drives
	  • servers
	  • CDs
	  • imaging systems
	• physical:
	  • centralised or decentralised
	  • commercial storage service or government repository
	  • in-house or outsourced
	  • microform
	  • offline or off-site

Transfer may include:	• copying or downloading from one medium to another • flagging electronic records for offline storage • migrating from one database to another • movement between organisations • placing paper, microform, audio-visual or multimedia records into boxes

Identifying documentation may include:	• recording old and new unique identifiers found in:
	  • business or record system
	  • records themselves
	  • documentation accompanying the records
	• preparing records of transfer which include:
	  • approving officer
	  • dates
	  • destination
	  • locations
	  • method to be used
	  • originating organisation
	  • range of record unique identifiers
	  • titles
	  • who undertook the transfer

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRKG303B Retrieve information from records

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to receive a request and to deliver the record or information about the record. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals requiring some understanding of relevant theoretical knowledge relating to recordkeeping functions. It is not assumed that individuals at this level would have responsibility for supervising the work of others; however it is assumed that as a recordkeeping practitioner their work will support effective recordkeeping and governance practices across the organisation. The application is in relation to the retrieval of records from an existing business or records system that has guidelines and processes to assist in providing information in response to basic requests. The location of records will be performed under supervision or in consultation with more senior staff or users of the system.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Locate/retrieve records required	1.1. Identify and refine search criteria and keywords (or other control information) to retrieve ***records***, in consultation with user making ***request***
	1.2. Adopt a systematic approach to details that are difficult to determine
	1.3. Search ***business or records system*** to retrieve records according to agreed criteria
	1.4. Locate or retrieve records to match request
2. Ensure security of records	2.1. Identify person requesting the record and access category confirmed, in accordance with organisational procedures
	2.2. Check security and access clearance documents to match with category of identified person requesting the record

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Where necessary, inform user of access denial. in accordance with organisational procedures
3. Provide required information or records	3.1. Mask specific records, or portions thereof, to prevent access where required 3.2. Prepare requested information for requester in an ***appropriate format*** 3.3. Deliver record, or record information, within the specified timeframes 3.4. ***Document*** the process

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to explain and clarify procedures, and to interview users to identify their records/information needs
- literacy skills to read and interpret nature of record content, functions and problems
- problem-solving and analysis skills to identify records
- research skills to identify, retrieve and organise information for users.

Required knowledge

- key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect aspects of business operations, such as:
  - AS 5044.1:2002 AGLS Metadata element set
  - AS 5090:2003 Work process analysis for recordkeeping
  - AS ISO 15489:2004 Records management
  - AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  - Australian Stock Exchange(ASX) Principles of Good Corporate Governance
  - ethical principles
  - codes of practice
  - privacy and freedom of information
  - archives and records legislation
  - occupational health and safety
- general principles and processes of records management and records management

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REQUIRED SKILLS AND KNOWLEDGE
systems, such as: • systems of control • records continuum theory • mandate and ownership of business process • environmental context • records characteristics • organisational business functions, structure and culture.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • working with system users to identify information requirements • maintaining accuracy in recording information • providing appropriate information and responses to requests.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated work environment • access to office equipment and resources • access to examples of records, recordkeeping systems and policies • access to workplace reference materials such as procedural manuals and company policies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace

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EVIDENCE GUIDE	
	reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • oral or written questioning to assess knowledge of general principles and processes of recordkeeping systems.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Records may include:	• different stages of use:
	  • active
	  • archival
	• digital:
	  • remote drives
	  • servers
	  • CDs
	  • DVDs
	  • imaging systems
	  • PC-based applications
	  • mainframe
	• physical:
	  • audio-visual or multimedia
	  • graphic
	  • microform
	  • paper-based (acid free or multiple copies

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RANGE STATEMENT	

	• variety of sources:
	  • already in the custody of the organisation
	  • in the process of being transferred between organisations

Request may be:	• computer-generated • email • facsimile • internet request • system-generated • verbal • written

Business or records systems may include:	• archival control systems
	• business systems
	• cash register-based systems
	• characteristics relating to:
	  • aggregations
	  • context
	  • entities
	  • metadata
	• current business or records systems
	• electronic records and document management system (ERDMS)
	• informal
	• paper-based accumulation and card systems
	• PC-based accounting systems, employee and tax records systems
	• proprietary recordkeeping package
	• storage facilities systems

Appropriate format for provision of information may include:	• hard or soft copy of original • digital • original • permission to view the information or record rather than being provided with a copy
Documenting the process may include:	• documenting specific records that have been retrieved and used to provide information including details such as the request for information, its receiver, permissions and formats • recording any new locations of records and the formats in which records are provided to the

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RANGE STATEMENT	
	user

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRKG304B Maintain business records

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to maintain the records of a business or records system in good order on a day to day basis. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals requiring some understanding of relevant theoretical knowledge relating to recordkeeping functions. It is not assumed that individuals at this level would have responsibility for supervising the work of others; however it is assumed that as a recordkeeping practitioner their work will support effective recordkeeping and governance practices across the organisation. The application is in relation to the maintenance of records from an existing business or records system that has guidelines and processes to assist in the process. Work carried out in the interest of system maintenance will be performed under supervision or in consultation with more senior staff or users of the system.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Collate business records	1.1. Identify individual ***records*** or ***information*** which should be incorporated into ***business or records system*** according to organisational criteria 1.2. Sort records in accordance with workplace requirements 1.3. Adhere to ***security and access requirements*** in accordance with organisational procedures
2. Update business or records system	2.1. Identify and record control information for describing new records to be incorporated into business or records system 2.2. Update control information describing movement or use of records within business or records system 2.3. Accurately record and update control information in business or records system 2.4. Identify and remove records of completed business

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ELEMENT	PERFORMANCE CRITERIA
	activities from current system for disposal
3. Prepare reports from the business or records system	3.1. Interpret requests for ***reports*** and clarify the content and frequency sought, where necessary 3.2. Prepare reports from business or records system in accordance with instructions or request 3.3. Prepare reports in accordance with organisational security and access procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to explain and clarify procedures, and to interview users to identify their records/information needs
- literacy skills to read and interpret nature of record content, functions and problems
- problem-solving and analysis skills to identify and manage records.

Required knowledge

- key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect aspects of business operations, such as:
  - AS 5044.1:2002 AGLS Metadata element set
  - AS 5090:2003 Work process analysis for recordkeeping
  - AS ISO 15489:2004 Records management
  - AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  - Australian Stock Exchange(ASX) Principles of Good Corporate Governance
  - ethical principles
  - codes of practice
  - privacy and freedom of information
  - archives and records legislation
  - occupational health and safety
- general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory

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REQUIRED SKILLS AND KNOWLEDGE
• mandate and ownership of business process • environmental context • records characteristics.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • complying with organisational procedures and workplace requirements • knowledge and understanding of business or records systems • accurately recording information.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated work environment • access to office equipment and resources • access to examples of records, recordkeeping systems and policies • access to workplace reference materials such as procedural manuals and company policies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • oral or written questioning to assess knowledge of

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EVIDENCE GUIDE	
	general principles and processes of business or records systems.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Records may be:	• at different stages of use:
	  • active
	  • archival
	• digital:
	  • remote drives
	  • servers
	  • CDs
	  • DVDs
	  • imaging systems
	  • PC-based applications
	  • mainframe
	• physical:
	  • audio-visual or multimedia
	  • graphic
	  • microform
	  • paper-based (acid free or multiple copies
	• from a variety of sources:
	  • already in the custody of the organisation
	  • in the process of being transferred between organisations

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RANGE STATEMENT	
Information may include:	• customer relationship management • expenditure • human resources management • invoicing/sales • legislative/regulatory/licensing compliance • risk management • stock control • taxation, asset management

Business or records systems may be:	• archival control systems
	• business systems
	• cash register-based systems
	• characteristics relating to:
	  • aggregations
	  • context
	  • entities
	  • metadata
	• current business or records systems
	• electronic records and document management system (ERDMS)
	• informal
	• paper-based accumulation and card systems
	• PC-based accounting systems, employee and tax records systems
	• proprietary recordkeeping package
	• storage facilities systems
	• systems unique to individual workplaces and organisations

Security and access requirements may relate to:	• individuals or positions of individuals • protection of privacy • security restrictions • trade secrets or commercial-in-confidence information
Reports may be:	• ad hoc • computer generated • hand prepared • part of a management solution for another support/operational function • regular records management reports • system management reports

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRKG305A Review recordkeeping functions

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to undertake research that supports work across a wide range of recordkeeping functions. This is a foundation unit for any person wishing to pursue competency in recordkeeping and provides a sound basis for working across various recordkeeping functional areas. This unit is based on the joint Australian Society of Archivists (ASA) and Records Management Association of Australasia's (RMAA) Statement of Knowledge for Recordkeeping Professionals. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals requiring some understanding of relevant theoretical knowledge relating to recordkeeping functions. It is not assumed that individuals at this level would have responsibility for supervising the work of others; however it is assumed that as a recordkeeping practitioner their work will support effective recordkeeping and governance practices across the organisation.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Research records and recordkeeping systems	1.1. Identify ***purpose of records*** and ***recordkeeping systems*** 1.2. Define ***characteristics of records*** 1.3. Select appropriate ***recordkeeping system characteristics*** 1.4. Research ***theories and principles of recordkeeping***
2. Review recordkeeping context	2.1. Define ***environmental context*** of records and recordkeeping systems 2.2. Research ***factors which may influence present or future needs*** of records or recordkeeping systems 2.3. Identify ***needs of stakeholders***, ***agents and users of records*** 2.4. Research ***theories and principles relating to***

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ELEMENT	PERFORMANCE CRITERIA
	recordkeeping environment or context
3. Document recordkeeping processes and practices	3.1. Collate, analyse and document ***recordkeeping processes and practices*** 3.2. Write report on outcomes of research 3.3. Develop recommendations for future activity

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to review records and recordkeeping frameworks
- problem-solving and analysis skills to interpret records management principles and practices.

Required knowledge

- key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect aspects of business operations, such as:
  - AS 5044.1:2002 AGLS Metadata element set
  - AS 5090:2003 Work process analysis for recordkeeping
  - AS ISO 15489:2004 Records management
  - AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  - Australian Stock Exchange(ASX) Principles of Good Corporate Governance
  - ethical principles
  - codes of practice
  - privacy and freedom of information
  - archives and records legislation
  - occupational health and safety
- organisational business functions, structure and culture.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • a report which documents the details of recordkeeping functions and processes within a recordkeeping system, and which demonstrates understanding of the requirements of good recordkeeping practices • knowledge of relevant legislation, regulations and standards.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of records, recordkeeping systems and policies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge and understanding
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other recordkeeping units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different

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RANGE STATEMENT	
work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Purpose of records and recordkeeping systems may include:	• providing evidence of and information about, social and business activities • relation to context in which records are created • individual, organisation and social accountability, and memory

Records may include:	• different stages of use:
	  • active
	  • archival
	• digital:
	  • remote drives
	  • servers
	  • CDs
	  • DVDs
	  • imaging systems
	  • PC-based applications
	  • mainframe
	• physical:
	  • audio-visual or multimedia
	  • graphic
	  • microform
	  • paper-based (acid free or multiple copies
	• variety of sources:
	  • already in the custody of the organisation
	  • in the process of being transferred between organisations

Characteristics of records may include:	• authenticity • documentation of social or business activity outcome • integrity • reliability • useability
Purpose of recordkeeping systems may include:	• capturing, managing and preserving records and information • compliance

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RANGE STATEMENT	
	• enabling access of records to meet requirements as specified by businesses or communities
Recordkeeping systems characteristics may include:	• aggregations • context • entities • metadata
Theories and principles of recordkeeping may include:	• accessibility of records • administrative change • advocacy and education of value of records for memory • appraisal theories • arrangement and description • classification schemes • custody principles • ethics and codes of practice • life cycle theory • mandate and ownership of business process • original order • provenance • record continuum theory • risk principles • systems of control
Environmental context may include:	• business environments • community expectations • governance frameworks • legislative and regulatory mandates • relevant recordkeeping principles and standards
Factors which may influence present or future needs may include:	• advances in recordkeeping best practice • changing expectations and/or needs of individuals, organisations, communities or society • technological change • value of records over time
Needs of stakeholders, agents and users of records may include:	• culture and language of individuals, organisations or communities • educational requirements • levels of expertise and knowledge • perspective of stakeholders

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RANGE STATEMENT	
Theories and principles relating to recordkeeping environment or context may include:	• administrative change • information management frameworks • legal mandates and ownership of business process • principles of risk management • provenance
Documentation relating to ***recordkeeping processes and practices*** may include:	• business and systems analysis • capturing records • care and handling • classification • context • custody • disposal • functional requirements • metadata • preservation • reference and access • storage

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRKG401B Review the status of a record

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to review and document the changing context and status of records which have been appraised as having temporary or ongoing value, and which have been identified as requiring conditions for access. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are required to demonstrate understanding of a broad knowledge base incorporating some theoretical recordkeeping concepts. The application is in relation to business or records systems that have guidelines and processes to assist in making judgements on the status and classification of records, and should be performed under supervision, or in consultation with more senior staff or users of the system.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify classes of records justifying review	1.1. ***Compile and review*** a list of the ***criteria for review*** to be met by ***records and formats*** 1.2. Apply the records in the subject jurisdiction criteria 1.3. Identify and document the records that meet the criteria
2. Review disposal authority and access conditions	2.1. Identify disposal authority, disposal class references and any ***access and security conditions*** for records, in accordance with industry practice 2.2. Identify and document records for which neither a disposal authority nor an access restriction exist, in accordance with industry practice 2.3. Assemble copies of related appraisal reports and access conditions for analysis 2.4. Make comparisons and take notes of any ***anomalies*** arising from the comparison, and recommend changes to existing disposal authorities and access conditions

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ELEMENT	PERFORMANCE CRITERIA
3. Prepare new appraisal reports	3.1. Prepare new appraisal reports including reference to criteria justifying the review 3.2. Make new interpretations of existing access criteria in light of criteria justifying the review 3.3. Expose new appraisals and access interpretations to appropriate stakeholders for comment, and submit for approval
4. Implement recommendations and re interpretations	4.1. Prepare methodology for implementation and assemble necessary resources 4.2. Produce and promulgate revised disposal authorities and access conditions 4.3. Document progress throughout implementation and record any issues or implications arising from revised disposal authorities and access conditions 4.4. Document implementation process and outcomes in organisation's business or ***recordkeeping systems***

Required Skills and Knowledge

Required skills
• communication skills to explain and clarify procedures, and to consult with users of a records or business system • literacy skills to read and interpret record content, functions and problems • problem-solving and analysis skills to interpret and apply access and security rules, retention and disposal skills • self management skills to accurately record metadata.
Required knowledge

• key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect aspects of business operations, such as:
  • AS 5044.1:2002 AGLS Metadata element set
  • AS 5090:2003 Work process analysis for recordkeeping
  • AS ISO 15489:2004 Records management
  • AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  • Australian Stock Exchange(ASX) Principles of Good Corporate Governance
  • ethical principles
  • codes of practice

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Required skills
• privacy and freedom of information • archives and records legislation • occupational health and safety • general principles and processes of records management and records management systems, such as: • systems of control • records continuum theory • mandate and ownership of business process • organisational business functions, structure and culture • organisational policies, strategies and procedures, particularly those relating to records access and security.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • defining issues in relation to a review of records • identifying potential recordkeeping implications of a change in the disposal status of records.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of records, recordkeeping systems and policies • access to workplace reference materials such as procedural manuals and company policies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques

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EVIDENCE GUIDE	
	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of revised disposal authorities and access conditions • oral or written questioning to assess knowledge of general principles and processes of recordkeeping systems.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Compiling and reviewing criteria may include:	• considering requirements for vital records including:
	  • legal liabilities
	  • ownership rights or entitlements
	  • policy records, precedents and decisions
	  • rights or entitlements of individuals
	• consulting identifying documentation found in:
	  • databases
	  • lists
	  • notes in relation to the records
	  • proforma
	• consulting retention and disposal schedules, which may be:
	  • continuing
	  • functional

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RANGE STATEMENT	

	• general
	• multiple
	• one-time
	• single
	• identifying:
	  • access restrictions
	  • any extenuating impediments to the destruction of records
	  • how information is likely to be presented and manipulated
	  • how information is likely to be retrieved
	  • how many people will need to retrieve the information
	  • what information is needed

Criteria for review may include:	• particular subject, for example, having political, educational, scientific, sociological or other interest • sustainability - voluminous record that is not used sufficiently frequently might not justify the resources its preservation consumes • sensitivity - some records may be deemed so sensitive that they may never be used for research • data extraction - previously unused means of extracting data from a particular record may increase its value • environmental context - business environments, community expectations, governance frameworks, legislative and regulatory mandates or relevant recordkeeping principles and standards

Records and formats may include:	• different stages of use:
	  • active
	  • archival
	• digital:
	  • remote drives
	  • servers
	  • CDs
	  • DVDs
	  • imaging systems

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RANGE STATEMENT	
	• PC-based applications • mainframe • documentation relating to: • authenticity • integrity • reliability • social or business activities • useability • physical: • audio-visual or multimedia • graphic • microform • paper-based (acid free or multiple copies) • variety of sources: • already in the custody of the organisation • in the process of being transferred between organisations
Access and security conditions may include:	• confidential • high-security (restricted) • open
Anomalies may include:	• changes to legislation such as census records becoming publicly accessible • citizenship status of people may change granting them different rights from what existed previously • government policy may see the value of records officially changed by decree • new technology may be developed to enable more information to be extracted from x-ray film
Recordkeeping systems may include:	• archival control systems • business systems • cash register-based systems • characteristics relating to: • aggregations • context • entities • metadata • current business or records systems

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RANGE STATEMENT	
	• electronic records and document management system (ERDMS) • informal • paper-based accumulation and card systems • PC-based accounting systems, employee and tax records systems • proprietary recordkeeping package • storage facilities systems

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRKG402B Provide information from and about records

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to respond as effectively as possible to enquiries from potential users of records, including using appropriate processes to access and provide information about records. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are required to demonstrate understanding of a broad knowledge base incorporating some theoretical recordkeeping concepts. The application is in relation to individuals who may regularly be expected to access an organisation's business and records systems in response to enquiries from users of the systems and others.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify and gather records required	1.1. ***Identify*** specific information or search criteria required by user 1.2. Identify ***range of records*** likely to contain information required and ascertain their availability using appropriate ***finding aids*** and ***records systems*** 1.3. Obtain range of records likely to contain information required by user, and analyse content 1.4. Track records to record any change in location and use, in accordance with business or records system rules and organisational procedures 1.5. Explain to user any ***obstacles*** to obtaining specific records within specified time and agree a timeframe for provision of records
2. Interpret and administer access rules and procedures	2.1. Identify person requesting record/s and confirm ***access*** category, in accordance with organisational procedures 2.2. Apply access restriction rules and guidelines to record/s requested to match access category of requester 2.3. Inform requester of their rights to review the decision where access restriction rules and guidelines

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ELEMENT	PERFORMANCE CRITERIA
	prevent access
3. Provide the required information and/or records	3.1. Prepare requested information/records in appropriate formats, and in accordance with organisational procedures and specified time lines 3.2. Mask specific records, or portions thereof, in accordance with access rules and organisational procedures 3.3. Document records retrieved and used to provide information, in accordance with business or records system operation and organisational procedures 3.4. Record new locations provided to user in accordance with system rules and organisational procedures 3.5. Deliver record, or record information, within specified timeframes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to explain and clarify procedures, and to interview users to identify their records/information needs
- literacy skills to read and interpret nature of record content, functions and problems
- problem-solving and analysis skills to identify records and information requested
- self management skills to accurately record metadata
- research skills to identify, retrieve and organise information for users.

Required knowledge

- construction and use of language in the organisation in relation to recordkeeping (past and present)
- key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect aspects of business operations, such as:
  - AS 5044.1:2002 AGLS Metadata element set
  - AS 5090:2003 Work process analysis for recordkeeping
  - AS ISO 15489:2004 Records management
  - AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles

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REQUIRED SKILLS AND KNOWLEDGE
• Australian Stock Exchange(ASX) Principles of Good Corporate Governance • ethical principles • codes of practice • privacy and freedom of information • archives and records legislation • occupational health and safety • general principles and processes of records management and records management systems, such as: • systems of control • records continuum theory • mandate and ownership of business process • environmental context • records characteristics • organisational business functions, structure and culture • organisational policies, strategies and procedures, particularly those relating to records access and security.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identifying records which accurately fulfil requests of users • applying access and security rules in the provision of records and information • knowledge of relevant legislation, regulations and standards.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of records, recordkeeping systems and policies • access to workplace reference materials such as procedural manuals and company policies.

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of requested information/records prepared • oral or written questioning to assessknowledge of general principles and processes of recordkeeping systems.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Identifying information or search criteria may include:	• keywords • control information

Range of records may include:	• different stages of use:
	  • active
	  • archival
	• digital:
	  • remote drives
	  • servers
	  • CDs
	  • DVDs

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RANGE STATEMENT	
	• imaging systems • PC-based applications • mainframe • physical: • audio-visual or multimedia • graphic • microform • paper-based (acid free or multiple copies) • variety of sources: • already in the custody of the organisation • in the process of being transferred between organisations
Finding aids to ascertain the availability of records may include:	• databases • indexes • microforms
Records systems may include:	• archival control systems • business systems • cash register-based systems • characteristics relating to: • aggregations • context • entities • metadata • current business or records systems • electronic records and document management system (ERDMS) • informal • paper-based accumulation and card systems • PC-based accounting systems, employee and tax records systems • proprietary recordkeeping package • storage facilities systems
Obstacles may include:	• cost • inaccurate finding aids • reluctance of individuals or organisations to provide records • remoteness of location • transaction of standard recordkeeping practices, such as disposal

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RANGE STATEMENT	
Access may include:	• interpretation of clearances and privacy restrictions • checking level of access and associated security releases

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRKG403C Set up a business or records system for a small business

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required knowledge and Range Statement changed to include environmentally sustainable practices. Replaces BSBRKG403B Set up a business or records system for a small business

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to research, develop and implement business or records systems for a small office.

Application of the Unit

This unit applies to individuals who are required to demonstrate understanding of a broad knowledge base incorporating some theoretical recordkeeping concepts. The application is in relation to individuals working in a range of 'small' office environments where, in most cases, recordkeeping is only part of the individual's responsibilities; the unit addresses the less formal recordkeeping requirements of micro or small businesses or branches and technical operations centres of larger organisations.

Typically, the individual would report to a supervisor or manager within the organisation and be solely responsible for the development and implementation of business or records systems, including training users of the system.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Determine recordkeeping requirements	1.1 Identify and ***document*** core business, supporting activities, ***resources***, and ***business and social context*** using observation and ***consultation***
	1.2 Determine security and access requirements for ***business or records system*** content from analysis of organisation's activities
	1.3 Analyse business documentation to determine organisational reporting and accountability requirements
	1.4 Identify ***organisational functions and activities*** for which records must be kept, from analysis of business and context documentation
	1.5 Determine nature, detail, and format of ***records*** (content and ***metadata***) for each organisational function and activity from analysis of the business and its context
2. Devise an appropriate recordkeeping system	2.1 Determine metadata needed to manage records (store, locate and retrieve) in a business or records system
	2.2 Select scale and number of business or records systems appropriate to scale and nature of business operations
	2.3 Select technological requirements of business or records systems appropriate to scale and nature of business operations
	2.4 Select cost structure for business or records systems appropriate to scale, nature, and organisational cash flow requirements
	2.5 Ensure maintenance, disposal and updating requirements of business or records system conform to scale, nature, and culture

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	of the organisation 2.6 Select business or records system suited to projected growth of the organisation
3. Develop business rules and procedures to support operations	3.1 Develop rules for incorporating individual records and information (records capture) into the business or records system 3.2 Develop rules for deciding and recording retention periods and appropriate disposal actions for records 3.3 Develop and document ***procedures for the use of the system*** 3.4 Provide system users with training or instructions in the use of the business or records system, in line with the culture and scale of the organisation

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to explain and clarify procedures, and to consult with users of a records or business system
- literacy skills to read and interpret record content, functions and problems
- problem-solving and analysis skills to identify requirements of business or records system.

Required knowledge

- key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect aspects of business operations, such as:
  - AS 5044.1:2002 AGLS Metadata element set
  - AS 5090:2003 Work process analysis for recordkeeping
  - AS ISO 15489:2004 Records management
  - AS ISO 23081.1:2006 Information and documentation – Records management processes – Metadata for records – Principles
  - Australian Stock Exchange (ASX) Principles of Good Corporate Governance
  - ethical principles
  - codes of practice
  - privacy and freedom of information
  - archives and records legislation
  - occupational health and safety
  - environmental sustainability practices in business operations

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- general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
  - environmental context
  - records characteristics
- internal controls
- organisational functions, structure and culture
- organisational policies and strategies
- organisational technological base.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • translating business functions and reporting requirements into a brief that describes the requirements of a business or records system • developing a business or records system, including rules and procedures • knowledge of organisational functions, structure and culture.
Context of and specific resources for assessment	Assessment must ensure: • access to examples of records, recordkeeping systems and policies • access to workplace reference materials such as procedural manuals and company policies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

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	• review of documentation outlining procedures developed for the use of the system • oral or written questioning to assess knowledge of general principles and processes of recordkeeping systems.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Documenting core business may involve identifying:	• authenticity, integrity, reliability and useability of records or other documents • diagrammatic representations • formal documents • hand written documents • informal communications • online instructions or computer-based format instructions that can be updated • paper-based manuals • other text.
Resources may include:	• human resources and their availability • location of resources currently in operation • physical resources • organisational policies and procedures • technological resources • those available for purchase or development.
Business and social context may include:	• clients or customers and their expectations • codes of ethics and codes of professional conduct specific to industry sector • community expectations • governance frameworks

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	• industry sector characteristics and reporting requirements of that sector
	• internal and external accountability requirements
	• internal and external stakeholders whose interests must be taken into account
	• other relevant legislation and regulations, including those covering:
	  • business activity reporting
	  • business and income (PAYE) taxation
	  • corporation law reporting requirements
	  • environmental protection and waste management
	  • goods and services tax collection
	  • industrial relations
	  • occupational health and safety
	  • privacy protection
	  • statutory access rights and freedom of information
	  • superannuation
	  • environmentally sustainable business practice
	• social and ethical standards the community expects the organisation to meet.

Consultation may include organisation's:	• head office • local management • principals • staff.

Business or records systems may include:	• archival control systems
	• business systems
	• cash register-based systems
	• characteristics relating to:
	  • aggregations
	  • context
	  • entities
	  • metadata
	• current business or records systems
	• electronic records and document management system (ERDMS)
	• informal
	• paper-based accumulation and card systems
	• PC-based accounting systems, employee and tax records systems
	• proprietary recordkeeping package
	• storage facilities systems.

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Organisational functions and activities that may be documented may include:	• asset management • conventional and email correspondence • customer relationship management • human resources management • invoicing and sales • legislative, regulatory and licensing compliance • marketing and promotion • purchasing and expenditure • research and development • risk management • stock control.

Records may include:	• different stages of use:
	  • active
	  • archival
	• digital:
	  • remote drives
	  • servers
	  • CDs
	  • DVDs
	  • imaging systems
	  • PC-based applications
	  • mainframe
	• physical:
	  • audio-visual or multimedia
	  • graphic
	  • microform
	  • paper-based (acid free or multiple copies
	• variety of sources:
	  • already in the custody of the organisation
	  • in the process of being transferred between organisations.

Metadata are those records which are maintained about the records themselves and may include:	• activity classification terms • date, time, and location of record creation or registration into the system • identity of record creator • indexing and descriptive terms • record format • security and access information • unique identifiers for each record.
Procedures for the use of the	• how to use the business or records system

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system may include:	• considering format and style • considering appropriateness for scale, nature, culture and number of operators who use the system.

Unit Sector(s)

Knowledge Management – Recordkeeping

Custom Content Section

Not applicable.

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BSBRKG404A Monitor and maintain records in an online environment

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit covers the identification and assessment of records for storage and the maintenance and monitoring of electronic business records. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are required to demonstrate understanding of a broad knowledge base incorporating some theoretical recordkeeping concepts. The application is in relation to working with electronic records in an existing business or records system that has guidelines and processes to assist in making judgements on the status and classification of records. These judgements should be performed under supervision or in consultation with more senior staff or users of the system.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Confirm requirements for recordkeeping in an online environment	1.1. Identify and confirm ***system*** procedures for capturing and managing ***records*** 1.2. Identify and verify organisational and ***risk management*** requirements for classifying and storing online information 1.3. Identify legal, business, financial, socio-historical, and security requirements for recording online business transactions 1.4. Prepare an organisational checklist in accordance with ***organisational requirements*** for use in assessing which electronic information should be captured, for how long and in what format
2. Identify and assess records for storage	2.1. Categorise incoming and outgoing information in terms of key activities and responsible personnel 2.2. Assess information against the organisational checklist and records identified for capture 2.3. Dispose information not to be stored in accordance

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ELEMENT	PERFORMANCE CRITERIA
	with organisational procedures 2.4. Determine ***storage*** methods and ***media*** in accordance with ***retention requirements***
3. Monitor and maintain business records in an online environment	3.1. Classify, sentence and link records with other records in the system in accordance with system rules and organisational procedures 3.2. Assign unique identifiers and register records into the recordkeeping system in accordance with system rules and organisational procedures 3.3. Determine ***access and security status*** and disposal requirements of records and records in accordance with organisational procedures 3.4. Store records on required ***media*** in accordance with organisational and record retention requirements 3.5. Carry out ***migration*** of records from one medium to another in accordance with organisational procedures 3.6. Action and record archiving or ***disposal*** of records in accordance with disposal schedule and organisational procedures 3.7. Maintain records in a usable and accessible form in accordance with security conditions and legislative requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to identify organisational requirements for recordkeeping in an online environment
- technology skills to address online access and security issues
- literacy skills to read and interpret record content, functions and problems
- problem-solving and analysis skills to identify requirements of business or records system
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities

Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE

• overview knowledge of key provisions of relevant legislation, regulations, standards and documentation that may affect relevant aspects of business operations, such as;
  • AS ISO 15489:2004 Records Management
  • AS 5044 AGLS Metadata element set
  • AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  • AS 5090:2003 Work process analysis for recordkeeping
  • ASX Principles of Good Corporate Governance
  • ethical principles
  • codes of practice
  • privacy and freedom of information
  • archives and records legislation
  • occupational health and safety
• general principles and processes of records management and records management systems, including, but not limited to ;
  • systems of control
  • records continuum theory
  • mandate and ownership of business process
• online recordkeeping environment including location and nature of transactions

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • monitoring usage of online business or records system • monitoring application of system procedures • managing records as they are created, updated, migrated and disposed of.
Context of and specific resources for assessment	Assessment must ensure: • examples of real or simulated records, recordkeeping

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EVIDENCE GUIDE	
	system and policies. • workplace reference materials such procedural manuals and company policies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques in a workplace or simulated environment • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of authenticated documents from the workplace or training environment • tests of knowledge on general principles and processes of recordkeeping systems.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • general administration units • other knowledge management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Systems relating to online records may include:	• archival control systems
	• business systems
	• cash register-based systems
	• characteristics relating to:
	  • aggregations
	  • context
	  • entities

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RANGE STATEMENT	
	• metadata • current business or records systems • ERDMS (Electronic Records and Document Management System) • informal • paper-based accumulation and card systems • PC-based accounting systems, employee and tax records systems • proprietary recordkeeping package • storage facilities systems

Records may include:	• digital, such as:
	  • remote drives
	  • servers
	  • CDs
	  • DVDs
	  • imaging systems
	  • PC-based applications
	  • mainframe
	  • server
	• physical, such as:
	  • audio-visual or multimedia
	  • graphic
	  • microform
	  • paper-based (acid free or multiple copies
	• a variety of sources, such as:
	  • already in the custody of the organisation
	  • in the process of being transferred between organisations
	• different stages of use, e.g.:
	  • active
	  • archival

Risk management requirements may include:	• backup and recovery procedures • policy and procedures for checking the accuracy and currency of data • remote storage for backup data • secondary storage requirements
Organisational requirements may include:	• business • financial • legal

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RANGE STATEMENT	
	• security • socio-historical
Storage may include:	• migration of records from one medium to another eg tape to compact disc • off-line • off-site • online • on-site • outsourced
Storage media may include:	• audiotape • audiovisual • compact disc • computer tape • diskette • film • hard drive • imaging systems • mainframe • microform • multimedia • paper based • server • video
Retention requirements may include:	• long term storage media for information / records • most cost-effective storage media for ephemeral or short term records • remote storage of backup data in case of fire or other incidents
Access and security status may include:	• confidential • high security (restricted) • open
Migration of records may include:	• from about-to-be superseded media eg 5Â¼" disks • from tapes, which may deteriorate over time
Disposal of records may include:	• destruction of paper based records eg shredding • permanent deletion from electronic media

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRKG502B Manage and monitor business or records systems

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to set the operational frameworks for the creation, capture and use of records and to monitor and review these frameworks and activities within a business or records system of a specific business domain. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are required to demonstrate understanding of a broad knowledge base, incorporating theoretical concepts with substantial depth in some areas. The application is in relation to managing and monitoring business and records systems or work carried out in specialist recordkeeping environments, such as archives. While these people will work closely with other staff members throughout an organisation, they may also have a degree of individual responsibility and autonomy.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Determine requirements or modifications	1.1. Identify and ***document*** core business, supporting activities, ***resources***, ***business and social context***, using observation and ***consultation***
	1.2. Determine security and access requirements for business or records system content from analysis of organisation's activities
	1.3. Analyse organisational reporting and accountability requirements in the context of the business documentation
	1.4. Identify ***organisational functions and activities*** for which records must be kept, from analysis of business and context documentation
	1.5. Determine nature, detail, and format of records (content and ***metadata***) for each organisational function from analysis of the business and its context

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ELEMENT	PERFORMANCE CRITERIA
2. Devise an appropriate recordkeeping system	2.1. Determine metadata needed to manage records (store, locate and retrieve) in a business or records system 2.2. Select scale, and number of ***business or records systems*** appropriate to scale and nature of business operations 2.3. Select technological requirements of business or records systems appropriate to scale and nature of business operations 2.4. Select cost structure for business or records systems appropriate to scale, nature, and organisational cash flow requirements 2.5. Ensure maintenance, disposal and updating requirements of business or records system conform to scale, nature, and culture of the organisation 2.6. Select business or records system suited to the projected growth of the organisation
3. Develop an implementation plan	3.1. Identify and document recordkeeping responsibilities of individual personnel or organisational units 3.2. Develop ***measurable performance indicators*** for recordkeeping activities 3.3. Develop ***procedures and guidelines*** for capturing and controlling records 3.4. Communicate an implementation plan to users of the system and other relevant organisational staff
4. Monitor and review business or records system	4.1. ***Monitor*** and notify staff in accordance with approved timeframes, frequency, and ***organisational policies and guidelines*** where applicable 4.2. Record details of ***variation*** from business or records system's rules, standards and procedures that exceed agreed limits 4.3. Provide required ***reports*** to ***appropriate authority*** relating to use and maintenance of records 4.4. Designate responsibilities to staff for record creation and capture activities in accordance with organisational policies
5. Identify and respond to problems and changes	5.1. Identify any ***problems and changes*** that require a ***systemic response*** using the monitoring reports and external events 5.2. Make recommendations for ***revisions*** to systems, procedures, and strategic plans in response to

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ELEMENT	PERFORMANCE CRITERIA
	identified variations, changes and problems 5.3. Devise amendments to systems and implementation or other plans where required 5.4. Prepare recommendations for system amendments, planning and implementation 5.5. Authorise or gain authorisation, for procedures for using the business or records systems, and for any subsequent alterations and amendments to the procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to explain and clarify procedures, and to interview users to identify their records or information needs
- literacy skills to read and interpret nature of record content, functions and problems
- negotiation skills to achieve suitable results for the organisation's recordkeeping practices
- problem-solving and analysis skills to interpret and apply recordkeeping principles and practices
- research skills to investigate changes and innovation in design and operation of business or records system
- self management skills to accurately record metadata.

Required knowledge

- construction and use of language in the organisation in relation to recordkeeping (past and present)
- key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect aspects of business operations, such as:
  - AS 5044.1:2002 AGLS Metadata element set
  - AS 5090:2003 Work process analysis for recordkeeping
  - AS ISO 15489:2004 Records management
  - AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  - Australian Stock Exchange(ASX) Principles of Good Corporate Governance

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REQUIRED SKILLS AND KNOWLEDGE
• ethical principles • codes of practice • privacy and freedom of information • archives and records legislation • occupational health and safety • general principles and processes of records management and records management systems, such as: • systems of control • records continuum theory • mandate and ownership of business process • organisational business functions, structure and culture • organisational policies, strategies and procedures, particularly those relating to records access and security.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • translating organisational needs into a business or records system • developing business or records system specifications and performance indicators to monitor and address system effectiveness • knowledge of relevant organisational policies, strategies and procedures.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of records, recordkeeping systems and policies • access to workplace reference materials such

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EVIDENCE GUIDE	
	procedural manuals and company policies.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of reports provided to appropriate authority relating to use and maintenance of records • oral or written questioning to assess knowledge of principles and processes of recordkeeping systems.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Documenting core business may involve identifying:	• diagrammatic representations • formal documents • hand written documents • informal communications • online instructions or computer-based format instructions that can be updated • paper-based manuals • other texts
Resources may include:	• human resources and their availability • location of resources currently in operation

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RANGE STATEMENT	
	• physical resources • technological resources • those available for purchase or development

Business and social context may include:	• clients or customers and their expectation
	• codes of ethics and codes of professional conduct specific to industry sector
	• industry sector characteristics and reporting requirements of that sector
	• internal and external accountability requirements
	• internal and external stakeholders whose interests must be taken into account
	• other relevant legislation and regulations, including those covering:
	  • business activity reporting
	  • business and income (PAYE) taxation
	  • corporation law reporting requirements
	  • environmental protection and waste management
	  • goods and services tax collection
	  • industrial relations
	  • occupational health and safety
	  • privacy protection
	  • statutory access rights and freedom of information
	  • superannuation
	• internal and external stakeholders whose interests must be taken into account
	• social and ethical standards the community expects the organisation to meet

Consultation may include organisation's:	• head office • local management • principals • staff
Organisational functions and activities that may be documented may include:	• asset management • conventional and email correspondence • customer relationship management • human resources management • invoicing and sales • legislative, regulatory and licensing

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RANGE STATEMENT	
	compliance • marketing and promotion • purchasing and expenditure • research and development • risk management • stock control
Metadata are those records which are maintained about the records themselves and may include:	• activity classification terms • date, time, and location of record creation or registration into the system • identity of record creator • indexing and descriptive terms • record format • security and access information • unique identifiers for each record

Business or records systems may include:	• archival control systems
	• business systems
	• cash register-based systems
	• characteristics relating to:
	  • aggregations
	  • context
	  • entities
	  • metadata
	• current business or records systems
	• electronic records and document management system (ERDMS)
	• informal
	• paper-based accumulation and card systems
	• PC-based accounting systems, employee and tax records systems
	• proprietary recordkeeping package
	• storage facilities systems

Measurable performance indicators may be developed:	• from a strategic plan • in consultation with those who will undertake the specific tasks
Measurable performance indicators may include:	• disposal (percentage of records, unsentenced records, those overdue for disposal action and functions or records not covered by disposal schedules) • parameters for tracking of records • retrieval and access (security and access rules,

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RANGE STATEMENT	
	response to request time limits, service levels for requests) • records creation and capture performance
Procedures and guidelines may include:	• acceptable range of variation for compliance • system requirements
Monitoring may relate to:	• broad accumulation and growth monitoring • checking spelling, spacing and numbering • continuing relevance of classification • disposal schedule applicability • examining titling and indexing at item level • new records specifications • number of systems • observation of localised rules and continuing relevance of classification • records creation and capture performance targets • single records management system
Organisational policies and guidelines may include:	• actions in relation to freedom of information legislation • actions or accumulations of records above or below anticipated levels • audit trail or log of users and activity in systems • changes in use of classification and indexing terms • access rules • disposal procedures • procedures in relation to disparity, sentencing difficulties or gaps in retention and disposal schedule coverage • procedures in relation to disputes arising from any matters, particularly access questions • failures in tracking or increases in lost items • input of metadata requirements • legal precedents requiring changes to systems • privacy requirements • quality of recordkeeping about records • records of authorisation of destruction • procedures in relation to reliability of optical character recognition techniques • retention of records in relation to a schedule

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RANGE STATEMENT	
	• scanned images • security requirements • specified access restrictions, in the public sector • storage standards and maintenance schedules
Variations may include:	• increases or decreases in the use of particular technologies • variations from the business or records system's performance or capacity • variations within the agreed limit which are inconsistent
Reports may include:	• compliance • maintenance • record capture • record creation • records use
Appropriate authority may include:	• audit committee • board of directors • committee of management • business owner • chief executive officer • delegated individual • external public authority • nominated senior management representative • recordkeeping professionals • senior management team
Problems and changes may include:	• case-law precedents • changes in administrative changes to functions and activities • changes of government • changes to organisational structures • closures and bankruptcy • legislative or other regulatory changes • outsourcing and privatisation • takeovers, amalgamations or relocation • technological change and implementation
Systemic responses may include:	• amendment/s to the classification system • bulk movement of records to control • migration of systems • new classification and controlled language

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RANGE STATEMENT	
	• new disposal classes or retention periods • new legal liabilities and other risks identified requiring changes to records specifications • new organisational or business unit functions
Revisions may be made to:	• access rules and procedures • classification and indexing schemes • disposal schedules • records specifications • storage projections and requirements

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRKG505B Document or reconstruct a business or records system

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to document or reconstruct a business or records system and its context over time. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are required to demonstrate understanding of a broad knowledge base, incorporating theoretical concepts with substantial depth in some areas. The application is in relation to those who work closely with other members of an organisation and have individual responsibility for documenting or reconstructing systems, and to those who work in specialist recordkeeping environments, such as archives. The unit can be applied equally to all types of collections of records, although historically it has been understood to relate only to traditional archival work. A business or records system may need to be reconstructed for a variety of reasons, including: • capturing into archival control systems for access and control purposes • changes to the system of control including computerisation or migration between systems • transfer of an organisation's ownership or control arising from amalgamation, takeover or bankruptcy • administrative change, closure of offices or changes in accommodation.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Establish activities and functions documented by records	1.1. Identify and document actions, activities and ***jurisdiction*** by which ***records*** are generated 1.2. Establish boundaries and relationships of activities and functions of records, and check these against a functional analysis of the organisation 1.3. Identify creators of records by mapping them to the parts of the organisation responsible for functions or

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ELEMENT	PERFORMANCE CRITERIA
	activities 1.4. Establish and document changes to functions or activities from the records, and verify against other appropriate ***sources*** over the time period of the records
2. Analyse the context of records and systems	2.1. Identify and describe previous or subsequent records or series to place records in their ***context***, in accordance with organisational standards 2.2. Identify changes to ***business or records systems*** which have occurred over time, including any anomalies to the systemic order of records 2.3. Identify and describe creators of records, including their accountabilities and functional responsibilities 2.4. Identify specific records by nature of their content, similar function, or systemic relationship 2.5. Document and report on the system and records, including identifying any changes and anomalies, in accordance with organisational standards
3. Document reconstruction of the business or records system	3.1. Identify and document elements of the business or records system from records 3.2. Identify and document records series in accordance with organisational standards and procedures 3.3. Establish ***control*** where no system is apparent, or where system is inadequate to maintain control of records, by capturing records in accordance with organisational standards and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to consult with practitioners, staff members, customers, and others to elicit relevant information for analysis • literacy skills to read and interpret nature of record content, functions and problems • problem-solving and analysis skills to interpret and apply principles of business or records systems • self management skills to accurately record metadata.

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge

• construction and use of language in the organisation in relation to recordkeeping (past and present)
• key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect aspects of business operations, such as:
  • AS 5044.1:2002 AGLS Metadata element set
  • AS 5090:2003 Work process analysis for recordkeeping
  • AS ISO 15489:2004 Records management
  • AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  • Australian Stock Exchange(ASX) Principles of Good Corporate Governance
  • ethical principles
  • codes of practice
  • privacy and freedom of information
  • archives and records legislation
  • occupational health and safety
• general principles and processes of records management and records management systems, such as:
  • systems of control
  • records continuum theory
  • mandate and ownership of business process
• organisational business functions, structure and culture
• organisational policies, strategies and procedures, particularly those relating to records access and security.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • interpreting the concepts of records series and records systems

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EVIDENCE GUIDE	
	• applying the concepts of records systems and series to an analysis of information about records in relation to organisational activities • knowledge of different systems for creating and managing records in the reconstruction of records systems.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of records, recordkeeping system and policies • access to workplace reference materials such as procedural manuals and company policy.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation outlining elements of the business or records system • oral or written questioning to assess knowledge of general principles and processes of recordkeeping systems.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other business services units • other knowledge management units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised

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RANGE STATEMENT	
wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Jurisdiction may include:	• government • non-profit • personal • private • profit • public sector

Records may include:	• different stages of use:
	  • active
	  • archival
	• digital:
	  • remote drives
	  • servers
	  • CDs
	  • DVDs
	  • imaging systems
	  • PC-based applications
	  • mainframe
	• physical:
	  • audio-visual or multimedia
	  • graphic
	  • microform
	  • paper-based (acid free or multiple copies)
	• variety of sources:
	  • already in the custody of the organisation
	  • in the process of being transferred between organisations

Sources may include:	• information relating to public entities:
	  • annual reports
	  • gazettes
	  • hansards
	  • interviews
	  • legislation
	  • minutes
	  • news clippings

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RANGE STATEMENT	
	• policies • related records • information relating to private entities: • company records • interviews • obituaries • personal letters • information from sources external to the entities: • administrative histories • annual reports and other corporate publications • biographies • literature • organisational histories
Context may include:	• chronological context: • complexity of records and changes over time • date of creation • date-range and size of records series • organisational or functional context: • complexity of system including anomalies and exception to system rules • industry sector • method of original records registration • multiplicity of activities • paper-based systems where the control records (registers, indexes, thesaurus) are discrete series • computerised systems in which the records are stored attached to their metadata (single series or systems to multiple series and multiple systems) • political or social environment • position of creator or range of creators of records within the organisation • records may be generated in a business system for a variety of functions and activities, or they may be part of a records management system

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RANGE STATEMENT	

Business or records systems may include:	• archival control systems
	• business systems
	• cash register-based systems
	• characteristics relating to:
	  • aggregations
	  • context
	  • entities
	  • metadata
	• current business or records systems
	• electronic records and document management system (ERDMS)
	• informal
	• paper-based accumulation and card systems
	• PC-based accounting systems, employee and tax records systems
	• proprietary recordkeeping package
	• storage facilities systems

Control may include:	• archival control systems • current business or records systems • storage facilities systems

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBRKG506A Develop and maintain terminology and classification schemes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop new or modified vocabulary controls and classification schemes for business or records systems based on an organisation's functions and activities. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are required to demonstrate understanding of a broad knowledge base, incorporating theoretical concepts with substantial depth in some areas. The application is in relation to those who work closely with other staff members throughout an organisation, and who may also have individual responsibility for the development and implementation of systems, or may be working in a specialist recordkeeping environment such as archives. Generally, where no formal vocabulary controls exist in an organisation there is a form of controlled titling. This unit covers the formalisation of such informal schemes. Vocabulary control, or controlled language, is commonly called a 'thesaurus' in some sectors of the recordkeeping industry. Where a new system of vocabulary controls is put in place, or amendments to current controls are introduced, many organisations may choose to implement training or development programs to assist users with implementation.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Research classification scheme and terminology	1.1. ***Examine*** work of an organisation to identify terminology that may reflect business functions and activities 1.2. Review and analyse functional analyses for the basis of terminology and classification schemes 1.3. Review ***other relevant materials and documents*** to analyse potential impact on vocabulary controls and

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ELEMENT	PERFORMANCE CRITERIA
	classification scheme 1.4. Examine any existing classification schemes and terminology to assess for currency and coverage 1.5. Examine representative samples of records to confirm extent to which an existing classification scheme and terminology have been implemented
2. Develop draft terminology and classification scheme	2.1. Prepare draft vocabulary controls and titling rules 2.2. Ensure draft vocabulary controls reflect organisation's business culture, operational realities and business language 2.3. Identify broad ***classification*** groups from a functional analysis 2.4. Analyse and decompose broad classification groups to the level required for an organisation's use 2.5. Document ***draft classification scheme***
3. Validate draft terminology and classification scheme	3.1. Prepare ***methodology for the validation process*** taking local imperatives and environment into consideration 3.2. Conduct consultation with users to identify issues, problems, inconsistencies and any required amendments or additions to draft classification scheme, existing language and vocabulary controls 3.3. Conduct testing and encourage feedback from users to identify any problems and inconsistencies with draft classification scheme and terminology 3.4. Document outcomes throughout the validation process
4. Implement and review terminology and classification scheme	4.1. Prepare classification scheme and terminology from validation and research 4.2. Undertake negotiations with competing interests within the organisation to ensure common understanding and appropriateness of work use and definitions 4.3. Note where existing system requires modification, and prepare specific recommendations in accordance with organisational guidelines 4.4. Prepare ***final report*** of terminology and classification scheme, in accordance with organisational practice and Australian Standards and international standards 4.5. Seek formal endorsement from ***appropriate individual or body*** through submission of revised,

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ELEMENT	PERFORMANCE CRITERIA
	amended and completed classification scheme

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to consult with practitioners, staff members, customers, and others to elicit relevant information for analysis
- literacy skills to read and interpret nature of record content, functions and problems
- problem-solving and analysis skills to apply rules of classification
- self management skills to accurately record metadata.

Required knowledge

- construction and use of language in the organisation in relation to recordkeeping (past and present)
- key provisions of relevant legislation, regulations from all forms of government, standards and documentation that may affect aspects of business operations, such as:
  - AS 5044.1:2002 AGLS Metadata element set
  - AS 5090:2003 Work process analysis for recordkeeping
  - AS ISO 15489:2004 Records management
  - AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  - Australian Stock Exchange(ASX) Principles of Good Corporate Governance
  - ethical principles
  - codes of practice
  - privacy and freedom of information
  - archives and records legislation
  - occupational health and safety
- general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory
  - mandate and ownership of business process
- organisational business functions, structure and culture
- organisational policies, strategies and procedures, particularly those relating to

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REQUIRED SKILLS AND KNOWLEDGE
records access and security.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • translating elements of a functional analysis to a coherent, logical, multi-level scheme of terms appropriate to the organisational context • consistently analysing and classifying usage of descriptive terms in detail .
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to examples of records, recordkeeping system and policies • access to workplace reference materials such as procedural manuals and company policy.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of methodology prepared for the validation process • oral or written questioning to assess knowledge of general principles and processes of recordkeeping systems.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Examining the work of an organisation may include review of:	• annual reports • controlled language schemes from existing and other organisations • legislation • memoranda and articles • organisational charts • policies • procedural manuals • publicity brochures and leaflets • service directories • strategic and business plans
Other relevant materials and documents may include:	• organisational charts • policies • procedural manuals • service directories • strategic and business plans • vocabulary control tools from other organisations
Classification may be organised by:	• body of knowledge • organisation function and/or activity • subject
Draft classification scheme	• hierarchical structure, that is specific to an organisation

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RANGE STATEMENT	
should include:	• sufficient classes and sub-classes to include all business functions and activities being documented • terminology in accordance with organisational and industry standards for terminology and usage
Methodology for the validation process may include:	• focus groups • interviews • number and location of sites • resources available • size of organisation • survey • targeting and involvement of key individuals and groups • testing • time available • user-driven
Final report may include:	• implications for implementation • inclusion in organisational policy • provision for review • scope of compliance
Appropriate individual or body for review may include:	• business managers • business owner • nominated senior management representative/s • senior management team • system users

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

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Co-requisite units

Co-requisite units		

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BSBRKG601B Define recordkeeping framework

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to define, identify and establish the recordkeeping framework for an organisation or business unit at functional level. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with understanding and specialist knowledge, with depth in some areas of business or records systems. The application is in relation to senior staff in a specialist recordkeeping environment with responsibility for a team, though the unit may also apply to individuals with sole responsibility for recordkeeping systems within larger enterprises. The development of a recordkeeping framework enables employees to create records that will adequately document the business activities in which they take part. It will also ensure that the information and processing systems which support business activities create appropriate records as part of their role in supporting those activities. The recordkeeping framework includes regulatory requirements, areas of risk, evidence to be captured as records, and responsibilities for recordkeeping to develop business systems.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Establish regulatory and social environment	1.1. Identify and document ***legal and regulatory framework*** for the organisation in accordance with industry standards 1.2. Analyse and document relevant legislation for implications for recordkeeping 1.3. Review documentation of organisational functions for compliance 1.4. Analyse ***broad social context*** in which the organisation operates to determine community expectations about how it should conduct itself
2. Determine principal areas of risk requiring	2.1. Review and update organisation's existing risk analyses for implications in relation to redundancy of

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ELEMENT	PERFORMANCE CRITERIA
recordkeeping strategy	***records*** 2.2. Review and document ***regulatory requirements*** and legal liabilities for their impact on recordkeeping framework 2.3. Determine and document risks and liabilities to be managed by recordkeeping to inform development of the framework
3. Determine record requirements for each business function	3.1. Determine and analyse risks, liabilities and regulatory requirements against each business function 3.2. Communicate and document determined evidence requirements for each business function identifying evidence to be captured as records 3.3. Form the specifications for records from the evidence requirements in accordance with organisational technologies, standards and corporate culture, and in appropriate formats
4. Establish recordkeeping framework for organisation	4.1. Develop and communicate an overview of responsibilities for recordkeeping within the organisation 4.2. Define responsibilities and authorities in relation to regulatory requirements in accordance with industry standards 4.3. Define ***recordkeeping responsibilities*** and rights for each business function 4.4. Integrate identified risks and liabilities managed by recordkeeping with the definition of responsibilities for each function 4.5. Define, assign and document levels of accountability and responsibility for each level of recordkeeping 4.6. Communicate documented framework including areas of risk, regulatory requirements, records specifications and responsibilities for recordkeeping review and endorsement, to ***appropriate persons*** 4.7. Establish a review process and charge appropriate persons with maintaining the currency of the organisation's recordkeeping framework

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to explain complex relationships and processes effectively to users and management, and to consult with relevant stakeholders
- information management skills to analyse and synthesise documentation, verbally delivered information, and observed behaviours
- literacy skills to prepare, compile, and write complex documents and reports, and to document complex relationships and processes
- problem-solving skills to solve recordkeeping problems
- technology skills to use equipment relevant to conducting recordkeeping activities.

Required knowledge

- key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - AS 1203:1996 Microfilming of engineering documents
  - AS 2840:1986 Microfilming newspapers for archival purposes
  - AS 3674:1989 Storage of microfilm
  - AS 4003:1996 Permanent paper
  - AS 5044.1:2002 AGLS Metadata element set
  - AS 5090:2003 Work process analysis for recordkeeping
  - AS ISO 15489:2004 Records management
  - AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  - AS/NZS 4360:2004 Risk management
  - Australian Stock Exchange(ASX) Principles of Good Corporate Governance
  - codes of practice
  - ethical principles
  - occupational health and safety (OHS)
  - archives and records legislation
  - privacy and freedom of information
- general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory

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REQUIRED SKILLS AND KNOWLEDGE
• mandate and ownership of business process • organisational business functions, structure and culture • organisational policies, strategies and procedures, particularly those relating to records access and security • recordkeeping policies, strategies, functions and structures in the jurisdiction.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • researching and documenting the legal, regulatory and social factors which impact on the recordkeeping requirements of an organisation • documenting a risk management plan for recordkeeping activities • documenting recordkeeping requirements and plans required to implement the recordkeeping framework in an organisation • knowledge of relevant legislation, regulations and standards.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace • access to examples of records, recordkeeping systems and policies • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on the recordkeeping environment, risk management plans and recordkeeping framework plans • demonstration of research techniques to gather information on the legal, social, regulatory and

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EVIDENCE GUIDE	
	organisational environment and recordkeeping requirements • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of reports on the legal, social, regulatory and organisational environment and recordkeeping requirements • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legal and regulatory framework may include:	• anti-discrimination legislation • AS 1203:1996 Microfilming of engineering documents • AS 2840:1986 Microfilming newspapers for archival purposes • AS 3674:1989 Storage of microfilm • AS 4003:1996 Permanent paper • AS ISO 15489:2004 Records management • award and enterprise agreements and relevant industrial instruments

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RANGE STATEMENT	
	• codes of practice • corporation law • ethical principles • freedom of information legislation and principles • healthcare • tax, including income tax • industrial relations • OHS • privacy laws • statutory access • superannuation

Broad social context may include:	• analysis of:
	  • codes of ethics, codes of professional conduct specific to an industry sector
	  • community, social and ethical standards
	  • requirements of internal and external stakeholders
	  • legal framework regulating an organisation's operations

Records may include:	• different stages of use:
	  • active
	  • archival
	• digital:
	  • remote drives
	  • servers
	  • CDs
	  • DVDs
	  • imaging systems
	  • PC-based applications
	  • mainframe
	• physical:
	  • audio-visual or multimedia
	  • graphic
	  • microform
	  • paper-based (acid free or multiple copies)
	• variety of sources:
	  • already in the custody of the organisation
	  • in the process of being transferred between

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RANGE STATEMENT	
	organisations

Regulatory requirements may include:	• requirements in:
	  • codes of practice
	  • codes of practice for self-regulation
	  • international or national standards
	  • regulations or rules
	  • technical standards

Recordkeeping responsibilities may include:	• auditing the accuracy of recordkeeping activities • establishing standards and compliances for recordkeeping • establishing overall records management policy and procedures for the organisation based on organisational requirements • generating records • monitoring reliability and continuing operation of systems which generate records
Appropriate persons may include:	• management team • reference body appointed by management • senior manager for each business function

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBRKG603B Prepare a functional analysis for an organisation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to analyse the functions, activities and transactions of an organisation or business unit, and to identify and define its boundaries. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with understanding and specialist knowledge, with depth in some areas of business or records systems. The application is in relation to senior staff in a specialist recordkeeping environment with responsibility for a team, though the unit may also apply to individuals with sole responsibility for recordkeeping systems within larger enterprises.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish functions of the organisation at the highest level	1.1. Examine ***organisational or jurisdictional documentation*** to establish its principal functions 1.2. Identify programs, projects and supporting activities from reporting documentation, and allocate these to established functions 1.3. Analyse relationship between programs, projects and supporting activities and functions to identify overlap, ambiguities and omissions 1.4. Document and validate established functions, in accordance with organisational and industry standards
2. Determine component activities and transactions of identified functions	2.1. Review documentation of programs, projects and supporting activities allocated to established functions to develop a statement of all activities performed by the organisation, unit or jurisdiction using ***appropriate analysis methods*** 2.2. Obtain information about recurring transactions and actions by consulting ***agents***; and examine organisational and jurisdictional documentation, including records generated by the processes 2.3. Analyse imminent changes to organisation, unit or

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ELEMENT	PERFORMANCE CRITERIA
	jurisdiction's business for impact on identified activities 2.4. Document and review determined actions and transactions at activity level in preparation for validation, in accordance with industry standards
3. Build a functional representation of the organisation	3.1. Review and refine assembled documentation of transactions, activities and functions for completeness, accuracy and appropriateness of terminology 3.2. ***Document combined functional analysis*** in accordance with industry standards 3.3. Identify activities and functions mapped to organisational structures to direct and indirect relationships and anomalies 3.4. Document findings on relationships between functions and structure to build a functional representation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication and negotiation skills to explain complex relationships and processes effectively to users and management, and to consult with relevant stakeholders • information management skills to analyse and synthesise documentation, verbally delivered information and observed behaviours • literacy skills to prepare, compile and write complex documents and reports, and to document complex relationships and processes • problem-solving skills to solve recordkeeping problems • technology skills to use equipment relevant to conducting recordkeeping activities.
Required knowledge
• administrative history and regulatory context of area subject to functional analysis • business in which area subject to functional analysis is engaged • key provisions of relevant legislation, and regulations from all forms of government and standards that may affect aspects of business operations, such as:

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REQUIRED SKILLS AND KNOWLEDGE
• anti-discrimination legislation • AS 1203:1996 Microfilming of engineering documents • AS 2840:1986 Microfilming newspapers for archival purposes • AS 3674:1989 Storage of microfilm • AS 4003:1996 Permanent paper • AS 5044.1:2002 AGLS Metadata element set • AS 5090:2003 Work process analysis for recordkeeping • AS ISO 15489:2004 Records management • AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles • AS/NZS 4360:2004 Risk management • Australian Stock Exchange(ASX) Principles of Good Corporate Governance • codes of practice • ethical principles • archives and records legislation • occupational health and safety • privacy and freedom of information • general principles and processes of records management and records management systems, such as: • systems of control • records continuum theory • mandate and ownership of business process • organisational business functions, structure, context and culture • organisational policies, strategies and procedures, particularly those relating to records access and security • standards for hierarchical and logical representational analyses • technologies used in recordkeeping such as multimedia, records system packages and workflow packages.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • researching, developing and documenting a functional representation of the organisation including analysis of the legislative and social framework in which the organisation operates • knowledge of the organisation's functions and activities.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to examples of records, recordkeeping systems and policies • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on the functional analysis of an organisation • demonstration of research techniques to gather information on the legal, social, regulatory and organisational environment, and organisational functions and activities • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of reports on the legal, social, regulatory and organisational environment and recordkeeping requirements • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Organisational or jurisdictional documentation may include:	• administrative orders • annual accounts and budget statements • annual reports • audit reports • corporate plans, goals, mission statements and strategy statements • establishment charters • deeds of agreement • incorporation documentation • legislation • licensing and registration documents • official statements to shareholders
Appropriate analysis methods may include:	• activity-based thesauruses and classifications • logical or chronological analyses • proprietal (software) systems • published analyses • standards • workflow-based analyses
Agents may include:	• contractors • customers and clients • employees
Documenting combined functional analysis may include:	• written reports • presentations

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRKG604B Determine security and access rules and procedures

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to determine and establish the rules for access and use of records in an organisation, including classifications and procedures for managing access over time. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with understanding and specialist knowledge, with depth in some areas of business or records systems. The application is in relation to individuals with specialist knowledge in business or records systems. These people will generally be senior staff in a specialist recordkeeping environment with responsibility for a team, though they may also be individuals with sole responsibility for recordkeeping systems within larger enterprises.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Analyse access risks, rules and responsibilities	1.1. Establish, analyse and describe the impact of the ***legal and regulatory framework*** on access to records for the unit or the entire organisation 1.2. Analyse ***organisational documentation and information***, copies of appraisal reports and access conditions for records of comparable organisations 1.3. Review risk analyses and existing access rules for currency, and determine and document any necessary modifications 1.4. Analyse usage patterns of records in light of identified risks and existing access rules 1.5. Determine specific restrictions and other responses to regulatory obligations for records and activities 1.6. Determine responsibility for reviewing access decisions from gathered organisational documentation and information
2. Develop access	2.1. Consider ***factors impacting on access rights*** in

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ELEMENT	PERFORMANCE CRITERIA
strategy, classifications and rules	developing an access strategy from gathered information, based on established responsibilities for access to records, and in response to identified difficulties and risks 2.2. Determine broad access classifications and ***reasons for access restrictions*** from regulatory requirements, identified risks and patterns of use of records within the jurisdiction 2.3. Compile criteria for applying access classifications to records based on gathered information and performed analyses 2.4. Develop rules for applying classifications 2.5. Circulate access classifications and draft rules to users of the business or records system for comment, identify and analyse exceptions, and modify classifications where appropriate 2.6. Determine compliance regime and jurisdictional access regime 2.7. Seek authorisation from ***appropriate body*** for access classifications and procedures
3. Develop procedures to integrate into business or records system	3.1. Determine access permissions and restrictions for records by applying access rules 3.2. Establish and document ***categories of users*** using analyses of access rules and records usage 3.3. Document access permissions and restrictions in relation to categories of ***users*** 3.4. Establish ***mechanisms to control user access*** applying to records and to users 3.5. Develop and document specifications for recording authorised use of records 3.6. Integrate authorised access procedures into business or records system rules and procedures, and document changes
4. Review and amend access classifications and rules	4.1. Develop procedures for reviewing access decisions and for responding to exceptions 4.2. Identify a hierarchy of responsibility for reviewing access decisions to comply with jurisdictional access regime 4.3. Communicate changes to access rules and procedures to all users

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to explain complex relationships and processes effectively to users and management, and to consult with relevant stakeholders
- information management skills to analyse and synthesise documentation, verbally delivered information, and observed behaviours
- information management skills to identify recordkeeping specifications to implement access control and records of use
- information management skills to use judgement and discretion with sensitive and confidential information
- leadership skills to create and implement achievable recordkeeping mechanisms and practices for others to follow
- literacy skills to prepare, compile, and write complex documents and reports, and to document complex relationships and processes
- problem-solving skills to solve recordkeeping problems
- technology skills to use equipment relevant to conducting recordkeeping activities.

Required knowledge

- key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect aspects of business operations, such as:
  - AS 5044.1:2002 AGLS Metadata element set
  - AS 5090:2003 Work process analysis for recordkeeping
  - AS ISO 15489:2004 Records management
  - AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  - AS/NZS 4360:2004 Risk management
  - Australian Stock Exchange(ASX) Principles of Good Corporate Governance
  - ethical principles
  - codes of practice
  - archives and records legislation
  - privacy and freedom of information
  - occupational health and safety (OHS)
- general principles and processes of records management and records management systems, such as:
  - systems of control
  - records continuum theory

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REQUIRED SKILLS AND KNOWLEDGE
• mandate and ownership of business process • organisational business functions, structure and culture • organisational policies, strategies and procedures, particularly those relating to sensitive information • principles and practices of diversity and cross-cultural communication.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documenting usage and conducting a risk analysis of policies and procedures for implementing security and access rules • reporting on a recordkeeping access strategy, classifications and rules • documenting policies and procedures for recordkeeping in an organisation including access permissions, restrictions, and control mechanisms • reporting on success of implementation and amendments made in response to monitoring the implementation of the recordkeeping system • knowledge of organisational policies, strategies and procedures, particularly those relating to sensitive information.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to examples of records, recordkeeping system and policies • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

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EVIDENCE GUIDE	
	• assessment of written reports on the risk management plans, plans, strategies and monitoring reports • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of reports on the recordkeeping requirements, strategies, policies and procedures • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legal and regulatory framework may include:	• anti-discrimination legislation • AS 1203:1996 Microfilming of engineering documents • AS 2840:1986 Microfilming newspapers for archival purposes • AS 3674:1989 Storage of microfilm • AS 4003:1996 Permanent paper • AS ISO 15489:2004 Records management • award and enterprise agreements and relevant industrial instruments

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RANGE STATEMENT	
	• codes of practice • corporation law • ethical principles • freedom of information legislation and principles • healthcare • tax, including income tax • industrial relations • OHS • privacy laws • statutory access • superannuation
Organisational documentation and information may include:	• guidelines • legislation, regulations, case law and ethical codes of conduct • policies and standards • precedents • recordkeeping requirements • records disposal status and retention periods • records themselves • risk analyses • rules • strategic plans for recordkeeping and for maintaining usability and availability of records over time
Factors impacting on access rights may include:	• codes of conduct • common law rights protecting confidentiality • copyright and intellectual property rights • corporation law • freedom of information legislation • government records legislation • power of attorney legislation • privacy protection laws • professional privilege
Reason for access restrictions may include:	• age of records • commercial value and intellectual property rights • confidentiality (personal, professional or commercial) • cultural protocols • investigatory and law enforcement

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RANGE STATEMENT	
	requirements • monetary value • physical integrity, state, fragility • political, personal and physical sensitivity • security classifications
Appropriate body may include:	• external body designated by legislation governing recordkeeping for the jurisdiction • senior manager responsible for recordkeeping policy for whole organisation • statutory office holder designated by organisation's legislative warrant

Categories of users may include:	• groupings according to:
	  • delegated authority
	  • identified categories of external stakeholders
	  • level within organisational hierarchy
	  • location within organisational structure
	  • professional grouping
	  • public access rights
	  • security clearance codes

Users may include:	• staff members from:
	  • across the whole organisation or external
	  • internal business area
	• parties to the business transactions
	• those requiring the records for use unrelated to the original business recorded

Mechanisms to control user access may include:	• electronic keys • external stakeholders • individual permissions • legislative permissions • pass-codes • passwords • redaction • other physical means of restricting access

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRKG605B Determine records requirements to document a function

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to determine the structure, content and context of records to document a business function. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with understanding and specialist knowledge, with depth in some areas of business or records systems. The application is in relation to individuals with specialist knowledge in business or records systems. These people will generally be senior staff in a specialist recordkeeping environment with responsibility for a team, though they may also be individuals with sole responsibility for recordkeeping systems within larger enterprises. Note that the record requirements for a given function tend to have a longer life span than any system developed to manage its records; this is particularly the case with computerised systems in which specifications tend to change with each cycle of software upgrade.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Locate the function in its organisational and regulatory context	1.1. Identify, review and document regulatory framework for a ***business function*** 1.2. Establish and document organisation's accountability requirements for the function 1.3. Establish business processes associated with the function from ***existing documentation***
2. Review existing recordkeeping practices for the function	2.1. Review existing records generated by the function to identify essential contents, examine the patterns of use, and identify any new developments in processes or regulatory requirements 2.2. Identify and document risks and liabilities specific to the function from organisation's risk analysis and litigation history 2.3. Consult users who carry out the function and create

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ELEMENT	PERFORMANCE CRITERIA
	and use records to identify their assessment of the adequacy of existing records 2.4. Analyse review findings to identify existing and new elements required in the records and to document these
3. Document the function's record requirements	3.1. Determine requirements for evidence in relation to the function's performance, accountabilities and risk analysis, and analyse patterns of use of records 3.2. Analyse requirements for evidence to identify all the business transactions of the function that need to be documented in the business or records system 3.3. Document criteria for identifying business transactions and procedures for applying the criteria 3.4. Determine content and structure of the records in all business transactions from the business processes, standards applicable to those processes, and review of existing records 3.5. Specify document structure and ***metadata*** for controlling the records of the business transactions, in accordance with external or organisational standards and organisational styles 3.6. Prepare and document procedures for capturing the documents, attaching metadata as required and managing the records to instruct users

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication and negotiation skills to explain complex relationships and processes effectively to users and management, and to consult with relevant stakeholders • information management skills to analyse and synthesise documentation, verbally delivered information, and observed behaviours • literacy skills to prepare, compile and write complex documents and reports, and to document complex relationships and processes • problem-solving skills to solve recordkeeping problems.

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge

• key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect aspects of business operations, such as:
  • AS 5044.1-2002 AGLS Metadata element set
  • AS 5090:2003 Work process analysis for recordkeeping
  • AS ISO 15489:2004 Records management
  • AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  • AS/NZS 4360:2004 Risk management
  • Australian Stock Exchange(ASX) Principles of Good Corporate Governance
  • ethical principles
  • codes of practice
  • archives and records legislation
  • privacy and freedom of information
  • occupational health and safety
• general principles and processes of records management and records management systems, such as:
  • systems of control
  • records continuum theory
  • mandate and ownership of business process.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • reporting on the recordkeeping requirements of business functions • knowledge of general principles and processes of records management and records management systems.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to examples of records, recordkeeping systems and policies • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports on business function recordkeeping requirements • demonstration of research undertaken to gather information on the legal, social, regulatory and organisational environment and analysis of existing recordkeeping practices • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations on records requirements for a function • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating

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RANGE STATEMENT	
conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Business functions may include:	• core business activities • operational activities • support activities (e.g. financial, personnel and asset management)
Existing documentation may include:	• documents outlining responsibilities for recordkeeping • documents pertaining to risk management activities • existing records requirements for business functions • functional analysis or representation of the organisation • organisation's recordkeeping policy
Metadata may include:	• classification data (access, functional, disposal status) • creating context data • indexing and retrieval data • unique identifiers and other registration data

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBRKG606B Design a records retention and disposal schedule

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop retention periods and disposal actions for existing records, or those that may yet be brought into existence, in relation to a business function. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with understanding and specialist knowledge, with depth in some areas of business or records systems. The application is in relation to individuals with specialist knowledge in business or records systems. These people will generally be senior staff in a specialist recordkeeping environment with responsibility for a team, though they may also be individuals with sole responsibility for recordkeeping systems within larger enterprises.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Analyse recordkeeping requirements for the function	1.1. Determine recordkeeping environment and ***legal***, ***business and societal context*** for the business function 1.2. Establish and document organisation's accountability requirements for the function 1.3. Analyse existing recordkeeping specifications for the function's records from a range of ***documentation sources***, and consider any relevant developments and their implications 1.4. Review and update risk analysis for the function as required in accordance with organisational and applicable Australian Standards and international standards 1.5. Research and analyse patterns of use of existing records to identify internal and external users, and periods and purposes of use 1.6. Canvass and document user views on their needs

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ELEMENT	PERFORMANCE CRITERIA
	and accessibility of the records 1.7. Update and document recordkeeping specifications for the function based on review analysis and survey of user views
2. Determine disposal status of records	2.1. Identify and review the function's business processes from existing functional analyses 2.2. Develop a hierarchical structure based on the functions and establish relevant activities in the functional analysis 2.3. Develop disposal classes according to the boundaries of the transactions and activities which make up the function's processes 2.4. Develop disposal status and retention periods for each disposal class from an analysis of documentation sources for business use, legal requirements, access classifications and review of risk analysis of the function 2.5. Review disposal status and retention periods for each disposal class in relation to the internal and external use of the records, the relationship with other organisational activities, and any other requirements determined from analyses of ***community expectations*** 2.6. Describe ***disposal actions*** for each disposal class
3. Document disposal status and retention periods	3.1. Ensure retention and disposal documentation contain details of business activities, records classes, and required disposal actions 3.2. Identify and assign responsibility for implementing disposal actions for records from retention and disposal documentation 3.3. Submit retention and disposal documentation for approval to ***appropriate individual or body*** 3.4. Compile and retain documentation of the analysis and related information for the life of the approved retention and disposal documentation 3.5. Describe disposal class and status, and appropriate disposal actions in the approved retention and disposal documentation

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to explain complex relationships and processes effectively to users and management, and to consult with relevant stakeholders
- information management skills to analyse and synthesise documentation, verbally delivered information, and observed behaviours
- literacy skills to prepare, compile and write complex documents and reports, and to document complex relationships and processes
- problem-solving skills to solve recordkeeping problems
- technology skills to retain and dispose of records.

Required knowledge

- key provisions of relevant legislation and regulations from all forms of government, national standards and other documentation that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - AS 1203:1996 Microfilming of engineering documents
  - AS 2840:1986 Microfilming newspapers for archival purposes
  - AS 3674:1989 Storage of microfilm
  - AS 4003:1996 Permanent paper
  - AS 5044.1:2002 AGLS Metadata element set
  - AS 5090:2003 Work process analysis for recordkeeping
  - AS ISO 15489:2004 Records management
  - AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  - AS/NZS 4360:2004 Risk management
  - Australian Stock Exchange(ASX) Principles of Good Corporate Governance
  - codes of practice
  - ethical principles
  - archives and records legsilsation
  - occupational health and safety
  - privacy and freedom of information
- organisational, jurisdictional and subsidiary functions, structure, policies, strategies and processes
- organisational and wider social context in which the jurisdiction, organisation, and part of the organisation operates
- general principles and processes of records management and records management

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REQUIRED SKILLS AND KNOWLEDGE
systems, such as: • systems of control • records continuum theory • mandate and ownership of business process • software applications associated with recordkeeping activities.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing and documenting a records retention and disposal schedule • knowledge of organisational, jurisdictional and subsidiary functions, structure, policies, strategies and processes.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to examples of records, recordkeeping systems and policies • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of record retention and disposal schedules • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of reports on the records retention and disposal schedule • oral or written questioning to assess knowledge and understanding

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EVIDENCE GUIDE	
	• review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legal, ***business and societal context*** may include:	• accountability requirements both internally and externally • codes of ethics, codes of professional conduct specific to an industry sector • community, societal and ethical standards • internal and external stakeholders • legal framework and industry standards which regulates organisational operations
Documentation sources may include:	• access (user permission) classification schemes • function-based records classification schemes • material prepared during or supporting documentation deriving from, the functional analyses • statistical reports from business or records systems such as movement histories, and search room or reading room statistics
Community expectations may include:	• accountability issues • public access and freedom of information legislation requirements

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RANGE STATEMENT	
	• security and disposal measures to prevent unauthorised use, and to protect privacy and personal information resulting in modifications to disposal status and practices
Disposal actions may include:	• conversion to other record formats • destruction • retention • transfer
Appropriate individual or body may include:	• board of directors • committee of management • business owner • chief executive officer • external public authority • nominated senior management representative • senior management team

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRKG607B Document and monitor the record creating context

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to monitor and document changes to the particular context or environment in which specific records were or are created, and in which they are used and maintained. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with understanding and specialist knowledge, with depth in some areas of business or records systems. The application is in relation to individuals with specialist knowledge in business or records systems. These people will generally be senior staff in a specialist recordkeeping environment with responsibility for a team, though they may also be individuals with sole responsibility for recordkeeping systems within larger enterprises. Examples of changes which should be monitored are reorganisations, down sizing, outsourcing, amalgamations or takeovers, major legislative change or change of government.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify the context of the organisation	1.1. Determine and document the nature of the organisation and its jurisdiction 1.2. Establish regulatory framework specific to the organisation
2. Establish accountability requirements for creators of records	2.1. Identify creators of records by establishing all parts of the organisation which create records 2.2. Determine and document accountability requirements and functional responsibilities of the creators of records 2.3. Verify and document authentic sources used in the research, in accordance with organisational and external standards
3. Identify contextual	3.1. Map the functions generating the records and the regulatory framework governing them, to the

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ELEMENT	PERFORMANCE CRITERIA
changes over time	organisational structures 3.2. Identify and document ***changes*** to the administrative and functional context over time
4. Monitor changes to organisational structures, functions and responsibilities	4.1. Monitor changes which impact on organisational structures 4.2. Review and update ***documentation*** in light of identified changes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to explain complex relationships and processes effectively to users and management, and to consult with relevant stakeholders
- information management skills to analyse and synthesise documentation, verbally delivered information, and observed behaviours
- literacy skills to prepare, compile, and write complex documents and reports, and to document complex relationships and processes
- problem-solving skills to solve recordkeeping problems.

Required knowledge

- administrative history and regulatory context of area subject to functional analysis
- business in which area subject to functional analysis is engaged
- key provisions of relevant legislation and regulations from all forms of government, national standards and other documentation that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - AS 1203:1996 Microfilming of engineering documents
  - AS 2840:1986 Microfilming newspapers for archival purposes
  - AS 3674:1989 Storage of microfilm
  - AS 4003:1996 Permanent paper
  - AS 5044.1:2002 AGLS Metadata element set
  - AS ISO 15489:2004 Records management
  - AS/NZS 4360:2004 Risk management
  - AS ISO 23081.1:2006 Information and documentation - Records management

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REQUIRED SKILLS AND KNOWLEDGE
processes - Metadata for records - Principles • AS 5090:2003 Work process analysis for recordkeeping • Australian Stock Exchange(ASX) Principles of Good Corporate Governance • codes of practice • ethical principles • archives and records legislation • occupational health and safety • privacy and freedom of information • general principles and processes of records management and records management systems, such as: • systems of control • records continuum theory • mandate and ownership of business process • organisational business functions, structure, context and culture • organisational policies, strategies and procedures, particularly those relating to records access and security • technologies used in recordkeeping such as multimedia, records system packages and workflow packages.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of thefollowing is essential: • documenting an analysis of the organisation's record creating context and the implications of changes to it in terms of records.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace • access to examples of records, recordkeeping systems and policies.

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EVIDENCE GUIDE	
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of reports on the organisational record creating context • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations on the record creating context • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Changes may include:	• amalgamations or take-overs • changes in legislation or government • downsizing • re-organisations • restructuring
Documentation may include:	• a finding aid • administrative history

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RANGE STATEMENT	
	• establishment chart and functional analysis • system administrator's documentation and users' register

Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRKG608B Plan management of records over time

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to determine the breadth and depth of a collection of records, and to develop strategic and implementation plans for the management of records over time. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with understanding and specialist knowledge, with depth in some areas of business or records systems. The application is in relation to individuals who require specialist knowledge in business or records systems. These people will generally be senior staff in a specialist recordkeeping environment with responsibility for a team, though they may also be individuals with sole responsibility for recordkeeping systems within larger enterprises. The unit can be applied equally to all types of collections of records, although historically it has been understood to relate only to traditional archival work.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Determine policies and strategies for management of records over time	1.1. Develop strategies to manage storage and access records, in accordance with industry standards and taking into account ***available resources***
	1.2. Develop strategies in the context of organisational culture, build on this, and include migration and preservation strategies
	1.3. Determine boundaries of the collection from identified recordkeeping requirements for the jurisdiction
	1.4. Determine records storage and use requirements from available documentation and observe ***organisational behaviour*** to enable monitoring against the strategic plan
	1.5. Identify other parties who create or use records

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ELEMENT	PERFORMANCE CRITERIA
	which require storage and factor these into estimates 1.6. Develop a vital records strategy that includes the ***criteria for vital records*** and the allocation of responsibility in case of a disaster 1.7. Incorporate vital records strategy into the wider organisational disaster management strategy after approval by ***appropriate authority***
2. Develop strategy and implementation plan for managing records over time	2.1. Review existing ***internal and external documents*** which may impact on the transfer of custody and responsibility for records 2.2. Confirm that recordkeeping jurisdictions of the organisation include boundaries of accountabilities from ***documentation relevant to the transfer of ownership or custody of records*** 2.3. Specify and document ***requirements for the transfer of custody***, ***ownership and responsibility*** 2.4. Specify nature of agreements with receiving bodies or individuals, including rules for negotiation, minimum requirements of legal custody, and signatories to the agreements 2.5. Clearly and logically document rules for the transfer of custody, ownership, and responsibility of records in accordance with organisational requirements
3. Manage preservation of records over time	3.1. Develop records collection strategies and policies which reflect the collecting institution's strategies and directions, and potential ***changes in operating environments*** 3.2. Ensure collections strategies reflect evaluation of collection use and availability of alternative formats for resource sharing and in-house collection, as well as access to records from remote sources 3.3. Determine ***boundaries for the collection***, and negotiate commonalities or overlaps of jurisdiction and common boundaries between collecting institutions 3.4. Manage selection, acquisition and disposal of collection material to make best use of staff knowledge, expertise and resources 3.5. Establish processes for the receipt of donations and bequests under legal deposits, policy or other directives, and review the collection in light of collection strategies, policies and disposal 3.6. Initiate and respond to cooperative collection

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ELEMENT	PERFORMANCE CRITERIA
	projects where ***mutual benefits*** can be gained

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to explain complex relationships and processes effectively to users and management, and to consult with relevant stakeholders
- information management skills to analyse and synthesise documentation, verbally delivered information, and observed behaviours
- literacy skills to prepare, compile and write complex documents and reports, and to document complex relationships and processes
- problem-solving skills to solve recordkeeping problems
- research and evaluation skills to identify organisational current and historical practices, and to discern the values if information, documents and manuscripts.

Required knowledge

- key provisions of relevant legislation from all forms of government, regulations, standards and documentation that may affect relevant aspects of business operations, such as:
  - anti-discrimination legislation
  - AS 1203:1996 Microfilming of engineering documents
  - AS 2840:1986 Microfilming newspapers for archival purposes
  - AS 3674:1989 Storage of microfilm
  - AS 4003:1996 Permanent paper
  - AS 5044.1:2002 AGLS Metadata element set
  - AS ISO 15489:2004 Records management
  - AS/NZS 4360:2004 Risk management
  - AS ISO 23081.1:2006 Information and documentation - Records management processes - Metadata for records - Principles
  - AS 5090:2003 Work process analysis for recordkeeping
  - Australian Stock Exchange(ASX) Principles of Good Corporate Governance
  - codes of practice
  - ethical principles
  - archives and records legislation

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REQUIRED SKILLS AND KNOWLEDGE
• occupational health and safety • privacy and freedom of information • general principles and processes of records management and records management systems, such as: • systems of control • records continuum theory • mandate and ownership of business process • organisational functions, structure and culture • organisational policies, strategies and procedures, particularly those relating to records access and security • recordkeeping policies, strategies, functions and structures in the jurisdiction • social and cultural trends which impact on recordkeeping.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing and documenting records management policies, procedures and strategies • documenting a recordkeeping plan • developing strategies that ensure records are preserved • knowledge of organisational functions, structure and culture.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of documented recordkeeping policies,

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EVIDENCE GUIDE	
	procedures and plans • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations of reports on recordkeeping plans • observation of techniques used to preserve records • oral or written questioning to assess knowledge and understanding • review of authenticated documents from the workplace or training environment • review of testimony from team members, colleagues, supervisors or managers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units • other knowledge management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Available resources may include:	• financial resources • human resources • physical resources • technological resources
Organisational behaviour may include:	• access arrangements • level of recordkeeping use • organisation growth • rules and monitoring of accumulation and retrieval rates
Criteria for vital records may	• industry standards

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RANGE STATEMENT	
include:	• organisational facilities • organisational policies • organisational priorities
Appropriate authority may include:	• management team • reference body appointed by management • senior manager for each business function
Internal and external documents may include:	• functional analyses • legislation and regulation • organisational and recordkeeping strategic plans • recordkeeping and information management system requirements • risk analyses
Documentation relevant to the transfer of ownership or custody of records may include:	• jurisdictional documentation • legislative framework • regulatory framework
Requirements for the transfer of custody, ownership and responsibility may include:	• agreement on price movement • completion of documentation about the transfer • physical custody arrangements • requirements of the records prior to, and post, transfer • storage and access agreements
Changes in operating environments may include:	• industry developments • legislative/regulatory developments • operating environments
Boundaries for the collection may include:	• appropriate match between collection policies and changing needs • mechanisms to improve and maintain data on collection use and user demand
Mutual benefits may include:	• benefits to the institution's users • incorporation of awareness of local, national and international issues, standards and protocols

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Knowledge Management - Recordkeeping

Co-requisite units

Co-requisite units		

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BSBRSK401A Identify risk and apply risk management processes

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify risks and to apply established risk management processes to a subset of an organisation or project's operations that are within the person's own work responsibilities and area of operation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a broad knowledge of risk analysis or project management who contribute well developed skills in creating solutions to unpredictable problems through analysis and evaluation of information from a variety of sources. They may have responsibility to provide guidance or to delegate aspects of these tasks to others. In this unit, risks applicable within own work responsibilities and area of operation, may include projects being undertaken individually or by a team, or operations within a section of the organisation.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify risks	1.1. Identify the ***context*** for risk management 1.2. Identify ***risks*** using ***tools***, ensuring all reasonable steps have been taken to identify all risks 1.3. Document identified risks in accordance with relevant policies, procedures and legislation
2. Analyse and evaluate risks	2.1. Analyse and document risks in consultation with relevant ***stakeholders*** 2.2. Undertake ***risk categorisation*** and determine ***level of risk*** 2.3. Document analysis processes and outcomes
3. Treat risks	3.1. Determine appropriate ***control measures*** for risks and assess for strengths and weaknesses 3.2. Identify control measures for all risks

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ELEMENT	PERFORMANCE CRITERIA
	3.3. Refer risks relevant to whole of organisation or having an impact beyond own work responsibilities and area of operation to others as per established policies and procedures 3.4. Choose and implement control measures for own area of operation and/or responsibilities 3.5. Prepare and implement treatment plans
4. Monitor and review effectiveness of risk treatment/s	4.1. Regularly review implemented treatment/s against ***measures of success*** 4.2. Use review results to improve the treatment of risks 4.3. Provide assistance to auditing risk in own area of operation 4.4. Monitor and review management of risk in own area of operation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills sufficient to read and understand a variety of texts; and to write, edit and proofread documents to ensure clarity of meaning, accuracy and consistency of information
- research and data collection skills to monitor and evaluate risks
- problem-solving skills to appropriately address identified risks.

Required knowledge

- Australian and international standards for risk management
- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - environmental issues
  - occupational health and safety
- organisational policies and procedures relating to risk management processes and

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REQUIRED SKILLS AND KNOWLEDGE
strategies • auditing requirements relating to risk management.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification, analysis and evaluation of risks • demonstrated understanding of personal role in relation to wider organisational or project context • demonstrated understanding of risk management processes and procedures.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation relating to risk management • access to risk management tools and frameworks.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documentation outlining risk analysis processes and outcomes • analysis of responses to case studies and scenarios • oral or written questioning to assess knowledge of Australian and international standards for risk management • review of implementation of treatment plans.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

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EVIDENCE GUIDE	
	• general administration units • other risk management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Context may include:	• any related projects or organisations • any resources, including physical assets, which are vital to operations • key operational elements and service of the organisation • organisation or project, how it is organised and its capabilities • own role and responsibilities in relation to overall project or organisation design
Risks may include:	• commercial and legal relationships • economic circumstances and scenarios • human behaviour • individual activities • management activities and controls • natural events • political circumstances • positive risk • technology - technological issues
Tools may include:	• documentation to assist in process of identifying risk, and assessing impact and likelihood of occurrence • standard instruments developed for the organisation and contextualised for sections of the workplace's operations, such as checklists and testing procedures • tools to prioritise risks, including where relevant, numerical scoring systems for risks

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RANGE STATEMENT	
Stakeholders may include:	• contractors • employees • financial managers • insurance agents • managers • public • service providers • suppliers • unions • volunteers

Risk categorisation may include:	• likelihood of risks:
	  • almost certain
	  • likely
	  • possible
	  • unlikely
	  • rare
	• consequences of risks:
	  • insignificant
	  • minor
	  • moderate
	  • major
	  • catastrophic
	  • current control measures

Level of risk may include:	• low, treated with routine procedures • moderate, with specific responsibility allocated for the risk, and monitoring and response procedures implemented • high, requiring action, as it has potential to be damaging to the organisation or project • extreme, requiring immediate action, as it has potential to be devastating to the organisation or project

Control measures may include:	• hierarchy of controls:
	  • reduction in likelihood of risks
	  • reduction of consequences of risks
	  • retention of risks
	  • risk aversion
	  • transfer of responsibility of risks

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RANGE STATEMENT	
Measures of success may include:	• costs • reductions in impact • reductions in likelihood • reductions in occurrence

Unit Sector(s)

Unit sector	

Competency field

Competency field	Regulation, Licensing and Risk - Risk Management

Co-requisite units

Co-requisite units		

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BSBRSK501B Manage risk

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required knowledge updated to incorporate current Australian Standards. Replaces BSBRSK501A Manage risk

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to manage risks in a range of contexts across the organisation or for a specific business unit or area.

Application of the Unit

This unit addresses the management of the risk across the organisation or within a business unit or area. It does not assume any given industry setting.

This unit applies to individuals who are working in positions of authority and are approved to implement change across the organisation, business unit, program or project area. They may or may not have responsibility for directly supervising others.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Establish risk context	1.1 Review organisational processes, procedures and requirements for undertaking ***risk*** management 1.2 Determine ***scope*** for risk management process 1.3 Identify internal and external stakeholders and their issues 1.4 Review political, economic, social, legal, technological and policy context 1.5 Review strengths and weaknesses of existing arrangements 1.6 Document critical success factors, goals or objectives for area included in scope 1.7 Obtain support for risk management activities 1.8 Communicate with ***relevant parties*** about the risk management process and invite participation
2. Identify risks	2.1 Invite relevant parties to assist in the identification of risks 2.2 ***Research*** risks that may apply to scope 2.3 Use ***tools and techniques*** to generate a list of risks that apply to the scope, in consultation with relevant parties
3. Analyse risks	3.1 Assess ***likelihood*** of risks occurring 3.2 Assess ***impact or consequence*** if risks occur 3.3 ***Evaluate*** and prioritise risks for treatment
4. Select and implement treatments	4.1 Determine and select most appropriate ***options*** for treating risks 4.2 Develop an ***action plan*** for implementing risk treatment 4.3 Communicate risk management processes to relevant parties 4.4 Ensure all documentation is in order and appropriately stored

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	4.5 Implement and monitor action plan 4.6 Evaluate risk management process

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication and literacy skills to consult and negotiate, to prepare communications about risk management, and to encourage stakeholder involvement
- organisational and management skills to plan and implement risk management processes
- problem-solving and innovation skills to find practical ways to manage identified risks.

Required knowledge

- AS/NZS ISO 31000:2009 Risk Management - Principles and Guidelines
- legislation, codes of practice and national standards, for example:
  - duty of care
  - company law
  - contract law
  - environmental law
  - freedom of information
  - industrial relations law
  - privacy and confidentiality
  - legislation relevant to organisation’s operations
  - legislation relevant to operation as a business entity
- organisational policies and procedures, including:
  - risk management strategy
  - policies and procedures for risk management
- overall operations of organisation
- reasonable adjustment in the workplace for people with a disability
- types of available insurance and insurance providers.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • risk management plan which includes a detailed stakeholder analysis, explanation of the risk context, critical success factors, identified and analysed risks, and treatments for prioritised risks • details of monitoring arrangements for risk management plan and an evaluation of the risk management plan's efficacy in treating risks • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge of risk management policies and procedures • review of documented critical success factors, and goals or objectives for area • review of risks prioritised for treatment • evaluation of action plan for implementing risk treatment • evaluation of documentation communicating risk management processes to relevant parties.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • financial management units, governance units, human resource management units, or technology units.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Risks may include those relating to:	• commercial relationships • economic circumstances and scenarios • human behaviour • individual activities • legislation • management activities and controls • natural events • political circumstances • technology.

Scope may apply to:	• given project
	• specific business unit or area
	• specific functional such as:
	  • financial management
	  • OHS
	  • governance
	• external environment
	• internal environment
	• whole organisation.

Relevant parties may include:	• all staff • internal and external stakeholders • senior management • specific teams or business units • technical experts.
Research may include:	• data or statistical information • information from other business areas • lessons learned from other projects or activities • market research • previous experience • public consultation • review of literature and other information sources.
Tools and techniques may include:	• brainstorms • checklists • fishbone diagrams

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	• flowcharts • scenario analysis.

Likelihood may refer to:	• probability of a given risk occurring, such as:
	  • very likely
	  • likely
	  • possible
	  • unlikely
	  • rare.

Impact or consequence may refer to:	• significance of outcomes if the risk occurs, such as:
	  • disastrous
	  • severe
	  • moderate impact
	  • minimal impact.

Evaluation of risks includes:	• considering the likelihood of the risk occurring • considering the impact of the risk • determining which risks are most significant and are therefore priorities for treatment.
Options may include:	• avoiding the risk • changing the consequences • changing the likelihood • retaining the risk • sharing the risk with a third party.
Action plans should include:	• what actions are required • who is taking responsibility • time lines • monitoring processes.

Unit Sector(s)

Management and Leadership – Management

Custom Content Section

Not applicable.

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BSBSLS407A Identify and plan sales prospects

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to identify potential sales prospects by applying prospecting methods, and to manage own sales performance by establishing a sales plan and managing stress, time and sales-related paperwork.

Application of the Unit

This unit applies to individuals working in a sales-related position in a small, medium or large enterprise in a wide variety of industries who identify, collate and follow up sales prospect information that can be used to generate leads. Individuals undertaking this unit may be at entry level or have experience in sales sufficient to provide advice and support about aspects of sales solutions as part of a sales team.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Employ prospecting methods and qualify prospects	1.1. Identify, consider and evaluate the strengths and limitations of a range of primary and secondary ***prospecting methods*** 1.2. Select prospecting methods to match the market to which the product or service is targeted 1.3. Target present, previous and new ***clients*** through chosen prospecting methods 1.4. Research and establish criteria for qualifying leads according to buyer accessibility, ***buyer motives***, product affordability, purchase authority, legal compliance and return for the seller 1.5. Ensure the established criteria represent a standard against which the buying potential of individuals and groups is gauged
2. Manage prospect information	2.1. Develop and implement a system for recording prospect information 2.2. Monitor and evaluate the effectiveness of the system for recording prospect information 2.3. Refine the system for recording prospect information based on evaluation
3. Establish an individualised sales plan	3.1. Establish individual sales goals and quotas to focus work activities based on organisational sales and marketing objectives 3.2. Establish consultation and communication structures with clients and supervisors

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ELEMENT	PERFORMANCE CRITERIA
	3.3. Plan and document an individualised sales plan to achieve sales goals and quotas within a work system that is constructed against clear timeframes 3.4. Monitor and adjust sales plan in relation to established goals and quotas 3.5. Evaluate sales plan and adjust where necessary
4. Complete sales paperwork and reports	4.1. Establish a system to collect, record and organise data associated with the sales process 4.2. Complete routine reports at regular intervals according to organisational requirements 4.3. Use ***available technology*** to facilitate record keeping and production of sales reports
5. Organise workload effectively	5.1. Establish routines to provide structure for work and to manage workload 5.2. Allocate time for specific ***work tasks*** and unanticipated events and activities 5.3. Conduct an analysis of the time spent on work-related activities and adjust time spent on tasks if required 5.4. Apply time-management strategies to minimise non-productive sales activities 5.5. Delegate tasks to individuals or sales team members to share workload as appropriate 5.6. Monitor ***symptoms of stress*** and establish a plan to reduce stress

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- learning skills to evaluate effectiveness of sales plan and make improvements to contribute to the organisation's operations and outcomes
- literacy and information management skills to collect, record and organise data to:
  - establish a sales plan
  - complete sales reports
- planning skills to establish, monitor and adjust sales plan as required
- research and data analysis skills to determine prospect requirements
- self-evaluation skills to identify symptoms of negative stress

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- technological skills to use a range of software and business equipment to:
  - collect and record prospect and sales information
  - design and record formats to facilitate information storage and retrieval
- self-management skills to manage own performance and set priorities
- time-management skills to:
  - meet sales time lines
  - sequence tasks
  - set priorities

Required knowledge

- information management strategies used to manage prospect and sales data
- key principles associated with self-management
- overview knowledge to identify key provisions of relevant legislation, codes of practice and national standards that affect business operations as they relate to sales, such as:
  - anti-discrimination
  - ethical principles
  - consumer protection
  - contract law
  - privacy laws
  - Trade Practices Act
- prospecting methods used in the sales process
- principles of buyer motives
- strategies and techniques to prevent and manage stress

Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of the use and management of different prospecting methods targeting a present, previous and new client • research and establishment of criteria used in qualifying leads identified through prospecting methods • recording, storage and retrieval of prospect information • development and documentation of a sales plan for a specified time period, including:

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	• sales goals • quotas • monitoring and evaluation strategies • organisation of own workload.
Context of and specific resources for assessment	Assessment must ensure access to: • a workplace or simulated work environment • organisational sales prospect information, databases and records • office equipment and resources.
Method of assessment	The following assessment methods are appropriate for this unit: • assessment of criteria developed to qualify sales leads • observation of demonstration of prospecting methods • assessment of individual sales plan documentation • direct questioning combined with portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • oral or written questioning to asses knowledge of principles of buyer motives, content of sales plan developed and techniques used to organise workload and manage stress levels • review of time-management strategies applied to minimise non-productive sales activities • review of system established to collect, record and organise data associated with the sales process.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Prospecting methods may include:	• brokers • cold canvassing • databases • direct mail • internet • intra-organisational leads

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	• journals • magazines • media advertising • networking • newspapers • personal observation • public records • referrals • spotters • telemarketing.
Clients may include:	• consumers • customers • members • patients • members of other business units within an organisation • other work teams within an organisation • person or organisation who receives or has the potential to receive products, services or ideas supplied by the organisation.
Buyer motives may include:	• browsing • buying for unqualified prospect e.g. dependant child • gift • housekeeping • replacement item • self-reward • self-gratification.
Available technology may include:	• databases • email • spreadsheets • word processing software packages • other computer applications.
Work tasks may include:	• administrative tasks • face-to-face selling • sales preparation • service calls • travelling.
Symptoms of stress may include:	• anxiety • changed eating habits • difficulty concentrating • fear of criticism or disapproval • feeling overworked or overloaded

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	• feeling tense or on edge • feeling tired • feeling unclear about roles and responsibilities • feeling weak or easily exhausted • increased consumption of alcohol • nervousness • restlessness • trembling or shaking • worry.

Unit Sector(s)

Business development - sales

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BSBSLS408A Present, secure and support sales solutions

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to present sales solutions that respond to the specific buying needs of a client, and to use sales processes associated with securing prospect commitment to proceed with a sale. The unit also includes attending to post-sales activities that build and strengthen the partnership between a salesperson and the client, and enhance the prospect of future sales.

Application of the Unit

This unit applies to individuals working in a sales-related position in a small, medium or large enterprise in a wide variety of industries who use specific sales techniques to present a sales solution to meet buyer needs, secure a prospect's commitment to purchase a product or service, and build post-sale and long-term relationships to establish an ongoing relationship with clients. They may provide sales solutions individually, or provide advice and support about aspects of sales solutions to support a sales team.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare for a sales presentation	1.1. Obtain and organise products, ideas and services for use within a sales presentation 1.2. Review product information to ensure familiarity with products 1.3. Identify sales tactic options, and assess and choose them in terms of their ability to meet the needs and preferences of the prospect 1.4. Consider a variety of sales solutions and prepare to meet buyer needs 1.5. Identify and select ***sales aids*** 1.6. Identify alternatives for prospects and assess them in relation to anticipated buyer needs
2. Present a sales solution	2.1. Use gestures, posture, body language, facial expressions and voice to create a supportive selling environment 2.2. Use listening skills and open-ended questions to identify buyer needs, preferences, motives and objections 2.3. Adjust presentation to match the needs and preferences of the buyer 2.4. Use persuasive communication techniques to secure buyer interest 2.5. Ensure the presentation demonstrates and communicates the key features of the product and emphasises benefits in relation to identified buyer

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ELEMENT	PERFORMANCE CRITERIA
	needs 2.6. Obtain and present ***proof of benefits*** through product purchase 2.7. Use sales aids to build buyer understanding of how the product is aligned with needs
3. Respond to buyer signals	3.1. Identify and assess ***verbal*** and ***non-verbal buying signals*** 3.2. Use probing to identify ***source of buyer resistance*** 3.3. Identify the strengths and limitations of ***buyer resistance strategies*** 3.4. Select and implement a strategy for managing buyer resistance 3.5. Use trial closes strategically during different stages of the sales process
4. Negotiate and finalise the sale	4.1. Initiate ***formal close*** to the sales process following one or more trial closes 4.2. Select a strategy to close the sale and use supportive and confirming language to support the closure of the sales process 4.3. Negotiate ***conditions*** of the agreement, outline a summary of the agreement to the buyer, and confirm the buyer's decision 4.4. Provide advice on financing arrangements if required 4.5. Prepare and complete sales documents, and process and monitor client order 4.6. Identify and present cross-selling opportunities to the buyer
5. Support post-sale activities	5.1. Ensure contact is made with the buyer post-sale to ensure agreed expectations have been met 5.2. Provide technical assistance or advice and assist clients to access appropriate after-sales support 5.3. Use ***feedback solicitation methods*** on the sales process and product satisfaction 5.4. Address and resolve service problems and difficulties identified through feedback 5.5. Develop and implement ***client loyalty strategies*** to secure buyer loyalty and facilitate ongoing contact 5.6. Offer and implement additional sales solutions and benefits to clients when opportunities arise

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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- learning skills to develop and maintain knowledge of products, ideas and services for use within a sales presentation
- literacy and numeracy skills to:
  - prepare sales documentation
  - process sales transactions
  - calculate financing arrangements
  - keep client sales records
  - use sales statistics to support a verbal argument
- organisational and time-management skills to schedule follow-up contacts
- verbal communication skills to:
  - demonstrate how product benefits and key features fulfil buyers' needs
  - develop rapport and build relationships with clients
  - manage conflict and customer dissatisfaction
  - negotiate to manage buyer resistance
  - question clients to determine client needs and preferences
  - use persuasive and assertive language in promoting product features and benefits
- technological skills to use equipment to assist in presenting sales information

Required knowledge

- detailed product knowledge, including product:
  - advantages and disadvantages
  - features
  - service benefits
- identification and overview knowledge of key provisions of relevant legislation and codes of practicethat relate to sales, for example:
  - anti-discrimination
  - ethical principles
  - consumer protection
  - contract law
  - privacy laws
  - Trade Practices Act
- materials and aids that support presentations
- organisational policies and procedures relating to orders and client services
- principles of achieving an effective sales presentation mix

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- statistical methods to demonstrate sales performance
- strategies to manage client accounts, to build client goodwill and to develop client loyalty

Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of principles of effective sales presentation mix and sales closure techniques through presentation of a sales solution • demonstration of support for post-sale activities.
Context of and specific resources for assessment	Assessment must ensure access to: • a workplace or simulated work environment • product information and sales records and documentation • office equipment, machines and sales support materials to make a presentation.
Method of assessment	The following assessment method is appropriate for this unit: • analysis of responses to case studies and scenarios • observations of presentations of sales solutions • direct questioning combined with portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of sales tactic options, proposed sales solutions and ways to overcome buyer resistance • observation of persuasive communication techniques and listening skills used when presenting a sales solution and closing a sale • review of sales aids identified, selected and used • evaluation of strategies implemented to manage buyer resistance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Sales aids may include:	• drawings • electronic media • graphs • models • photographs • printed materials • products • product samples • transparencies • whiteboards.
Proof of benefits may include:	• anecdotes and examples • comparisons • statistics • testimonials.
Verbal buying signals of the prospect may include:	• confirmations • questions • statements of requirement.
Non-verbal buying signals of the prospect may include:	• close examination of the product • moving closer to where a product is to be installed • smiling and nodding.
Source of buyer resistance may include:	• company resistance • no perceived need • price resistance • salesperson resistance • service dissatisfaction • timing issues • uncertainty about the product.
Buyer resistance strategies may include:	• assertive messages • boomerang • checking perceptions • direct denial • incentives offer • indirect denial

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	• requesting additional information from buyers • open and closed questions • superior benefit • trial offer.
Formal close may include:	• inducement • narrative close • offering alternative choices • salesperson request to the prospect to agree to purchase the product or service • summary of product benefits.
Conditions may include:	• client loyalty • delivery • length of contract • payment options • price.
Feedback solicitation methods may include:	• email dialogue • focus groups • one-on-one interviews • surveys • telephone interviews.
Client loyalty strategies may include:	• client clubs • client reward schemes • credit or discount facilities • formal letter of thanks • handwritten note thanking the client • offering promotional items • phone call thanking the client for the business.

Unit Sector(s)

Business development - sales

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BSBSLS501A Develop a sales plan

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop a sales plan for a product or service for a team covering a specified sales territory based on strategic objectives and in accordance with established performance targets. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a supervisory or managerial sales role who develop a sales plan for a product or service.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify organisational strategic direction	1.1. Obtain and analyse assessment of market needs and ***strategic planning documents*** 1.2. ***Review previous sales performance*** and successful approaches to identify factors affecting performance 1.3. Analyse information on market needs, new opportunities, customer profiles and requirements as a basis for decision making
2. Establish performance targets	2.1. Determine practical and achievable sales targets 2.2. Establish realistic time lines for achieving targets 2.3. Determine ***measures to allow for monitoring*** of performance 2.4. Ensure objectives of the sales plan and style of the campaign are consistent with organisational strategic objectives and corporate image
3. Develop a sales plan for a product	3.1. Describe approaches to be used to meet sales objectives 3.2. Identify ***additional expertise*** requirements and allocate budgetary resources accordingly 3.3. Identify risks and develop risk controls 3.4. Develop advertising and promotional strategy for ***product*** 3.5. Identify appropriate ***distribution channels*** for product

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ELEMENT	PERFORMANCE CRITERIA
	3.6. Prepare a budget for the sales plan 3.7. Present documented sales plan to appropriate personnel for approval
4. Identify support requirements	4.1. Identify and acquire staff resources to implement sales plan 4.2. Develop an appropriate ***selling approach*** 4.3. Train staff in the selling approach selected 4.4. Develop and assess staff knowledge of product to be sold
5. Monitor and review sales plan	5.1. Monitor implementation of the sales plan 5.2. Record data measuring performance versus sales targets 5.3. Make adjustments to sales plan as required to ensure required results are obtained

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and negotiation skills to determine sales needs, and to refine and modify sales plans in consultation with relevant organisational personnel
- creativity and innovation skills to develop and evaluate new sales approaches
- research and data collection skills to gather information to develop a sales plan.

Required knowledge

- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination
  - ethical principles
  - consumer protection
  - contract law
  - privacy laws
  - Trade Practices Act
- industry, organisation, product

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REQUIRED SKILLS AND KNOWLEDGE
• methods for monitoring sales outcomes • organisational strategic direction and objectives • principles and techniques for selling • statistical techniques for analysing sales and market trends.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of a sales plan for a product sold by an organisation • knowledge of organisational strategic direction and objectives.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • access to strategic planning and sales documents, data and information.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies • assessment of documented sales plans • demonstration of sales plan development techniques
Guidance information for assessment	

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Strategic planning documents may include:	• company mission statement • financial records • industry trends • marketing trends • operations plan • product trends • strategic plan
Reviewing previous sales performance may include:	• analysis of sales history • consideration of related product strategies • evaluation of competitors' or other companies' approaches • innovative suggestions • marketing research
Measures to allow for monitoring may include:	• volume of sales • whether sales targets are met or not • progress towards targets • surveys of potential/existing/previous clients
Additional expertise may include:	• designers of materials and displays • media producers • advertising executives
Products may include:	• goods • ideas • services
Distribution channels may include:	• agents • brokers • industry associations
Selling approach may include:	• answers to frequently asked questions • introductory techniques • planned approaches • sales scripts • strategies for handling negative comments

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Sales

Co-requisite units

Co-requisite units		

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BSBSLS502A Lead and manage a sales team

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan, implement, direct and evaluate sales team activities. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals working in a supervisory or managerial sales role who provide leadership to a sales team to increase the effectiveness of their performance.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan sales operations	1.1. Set sales teams objectives 1.2. Prepare sales plan and budget to support attainment of objectives 1.3. Develop objectives related to the nature of the sales operation which are consistent with marketing and sales strategies 1.4. Determine the size and structure of the sales team 1.5. Recruit, select and induct sales team members on an ongoing basis in accordance with job analysis and sales team objectives 1.6. Provide sales team members with initial training using appropriate ***training methods*** 1.7. Establish sales team compensation methods and levels 1.8. Establish sales territories, sales targets and performance standards
2. Direct sales team	2.1. Implement strategies to encourage, motivate and support sales team members 2.2. Coach or mentor sales team members to facilitate attainment of sales targets 2.3. Model client-focused tactics for sales team members 2.4. Allocate resources in accordance with organisational policies and procedures to support attainment of sales

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ELEMENT	PERFORMANCE CRITERIA
	targets 2.5. Analyse sales volume, conversion rate data and cross-selling ratios to monitor sales performance 2.6. Monitor the ethical and social conduct of the sales team in accordance with legal requirements, professional expectations and organisational policy
3. Evaluate sales team performance	3.1. Establish systems to evaluate sales effectiveness against performance standards 3.2. Offer sales team members constructive feedback on their performance 3.3. Recognise and reward superior sales team member performance 3.4. Take ***corrective action*** where sub-standard sales team member performance is identified 3.5. Adjust sales team planning in light of evaluation processes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to effectively work with a team
- financial management skills to manage a sales budget
- interpersonal skills to mentor, coach and apply training and development strategies
- leadership skills to gain trust and confidence of colleagues and clients
- literacy skills to interpret and explain complex, formal documents.

Required knowledge

- budgeting processes
- human resource management strategies
- principles of equal opportunity, equity, diversity and anti-discrimination
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination
- ethical principles

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REQUIRED SKILLS AND KNOWLEDGE
• consumer protection • contract law • privacy laws • Trade Practices Act • sales target and territory planning and management.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • management and development of a personal sales team to attain sales targets • knowledge of the principles of equal opportunity, equity, diversity and anti-discrimination.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of techniques used to manage sales team performance • review of sales teams objectives • review of resources allocated to support attainment of sales targets • assessment of established sales territories, sales

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EVIDENCE GUIDE	
	targets and performance standards • evaluation of recognition and rewarding of superior sales team member performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • management units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Training methods may include:	• audio-tapes • case studies • computer packages • films • lectures • one-on-one instruction • role plays • simulations • slides • teleconferencing • videoconferencing • videotapes
Corrective action may include:	• additional training • individualised development plans • mentoring • ongoing feedback goal related feedback • re-training

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Business Development - Sales

Co-requisite units

Co-requisite units		

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BSBSMB201A Identify suitability for micro business

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to set up a micro business. Specific legal requirements apply to the management of a micro business.

Application of the Unit

Application of the unit	This unit requires individuals to examine their potential for entering a micro business.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Explore potential business ideas	1.1. Identify products and services that are available from local ***micro and small businesses*** 1.2. Identify products and services that are not available locally 1.3. Determine opportunities for new micro businesses based on gaps in the provision of goods and services 1.4. Identify and utilise a ***range of sources*** to gather information about micro business opportunities identified 1.5. Outline the processes to be undertaken by the micro business to provide the products/services
2. Compare personal skills and aspirations with micro business opportunities	2.1. Identify personal reasons for entering into a micro business in realistic terms of own ***personal commitments***, ***expectations and capabilities*** 2.2. Match personal capabilities realistically with the identified business opportunities 2.3. Examine personal commitments, expectations and capabilities to realistically identify impacts on the preferred business opportunity 2.4. Examine options to address and minimise the negative impacts and strengthen the positive impacts of these issues
3. Access business learning opportunities, mentoring and advice	3.1. List the skills and knowledge required to develop and operate the business opportunity 3.2. Identify and interpret ***business information and terminology*** 3.3. Identify gaps in ***personal skills and knowledge*** which are needed for the business

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Identify appropriate ***learning opportunities*** to rectify gaps in personal skills and knowledge 3.5. Identify potential mentors, advisers, networks and sources of assistance for the business

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to prioritise micro business opportunities and to identify own skills gaps • communication skills to describe ideas, and own personal and life goals • literacy skills to record micro business opportunities, personal expectations, commitments and skills • research skills to investigate micro/small business products and services and the likely demand for products and services.
Required knowledge
• characteristics of micro/small business and its environment • learning opportunities and sources of assistance for micro/small business operators • personal skills required for micro business • products and services that are available from local micro/small businesses and those that are not available.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential: • sound description of the potential micro business

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EVIDENCE GUIDE	
competency in this unit	opportunity • clear description of own personal and business capabilities • effective matching of personal attributes with micro business opportunities and identification of personal development opportunities • knowledge of learning opportunities and sources of assistance for micro/small business operators.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • portfolio of evidence including a short oral or audiovisual presentation • review of personal skills plan • oral or written questioning to assess knowledge of own personal and business capabilities • review of personal capabilities matched with identified business opportunities.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB301A Investigate micro business opportunities.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Micro and small businesses may	• community owned and/or run businesses

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RANGE STATEMENT	
include:	• family owned and/or run businesses • franchise • government owned business • sole trader owned and/or run business • other such forms of small businesses which meet the accepted definition of a small business
Range of sources may include:	• Australian Bureau of Statistics • business advisors • business incubators • business people • business/trade associations • friends, family and community • government agencies • internet • local government • market research publications • mentors • teachers

Personal commitments, ***expectations and capabilities*** may include:	• community commitments and expectations
	• cultural values, behaviours and expectations
	• current and preferred lifestyle
	• customer expectations
	• family commitments and expectations
	• other business interests or employment
	• own financial background, commitments and aspirations
	  • personal motivation and entrepreneurship
	  • personal principles and ethics
	  • time commitments and availability

Business information and terminology may include:	• terms frequently used in business such as:
	  • balance sheet
	  • cost
	  • liabilities
	  • margin
	  • mark-up
	  • pricing
	  • profit
	  • return

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RANGE STATEMENT	

	• sales
	• information relating to businesses such as:
	  • compliance with legislation, regulations and codes of practice
	  • financial management
	  • marketing
	  • information technology (including e-business)
	  • production
	  • quality assurance

Personal skills and knowledge may include:	• ability to prioritise obligations and commitments • communication skills both with own community and other communities • cultural knowledge and sensitivities • financial management skills and business knowledge • life skills (including assertiveness) • literacy and numeracy skills • time management • marketing and selling skills • planning skills • positive relationships with family, customers, suppliers, staff and community • self-promotion and self-image • specific industry and local knowledge
Learning opportunities may include:	• coaching, mentoring and/or supervision • courses • informal training • personal study • recognition of competence or skills recognition • work experience • workplace training

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB301A Investigate micro business opportunities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop business ideas, and to investigate market needs and factors affecting potential markets. Specific legal requirements apply to the management of a micro business.

Application of the Unit

Application of the unit	This work will be undertaken by individuals who are establishing or operating a micro business providing for self employment.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Describe business ideas	1.1. Gather information for ***business ideas*** from ***appropriate sources*** 1.2. List details of business ideas and opportunities 1.3. Research alternative business ideas in light of the resources available 1.4. Specify and list products and services to match business ideas 1.5. Identify and research potential ***customer information*** for business ideas 1.6. Identify and take into account financial, business and technical skills available when researching business opportunities
2. Identify market needs	2.1. Collect information regarding market size and potential from appropriate sources 2.2. Investigate market trends and developments to identify market needs relative to business ideas 2.3. Gather market information from ***primary and secondary sources*** to identify possible market needs in relation to business ideas 2.4. Identify ***ethical and cultural requirements*** of the market and their impact on business ideas 2.5. Identify ***new and emerging markets*** and document their features

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ELEMENT	PERFORMANCE CRITERIA
	2.6. Identify and organise information on expected market growth or decline and associated risk factors
3. Investigate factors affecting the market	3.1. Identify projected changes in population, economic activity and the labour force that may affect business ideas 3.2. Identify movements in prices and projected changes in availability of resources 3.3. Review ***trends and developments*** and identify their potential impact on business ideas

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to identify market trends and developments, and to assess their impact on products and services • communication skills to request information from diverse sources • lateral thinking skills to generate ideas for potential businesses • literacy skills to interpret business and market information • numeracy skills to analyse data to aid business/market research • research skills to investigate market needs.
Required knowledge
• ethical and cultural requirements • research methods and data collection tools • sources of business and market information.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • thorough investigation of business opportunities and ideas • clearly identified products/services and customer information for each business idea • thorough collection and analysis of market information and associated factors relating to business ideas • knowledge of ethical and cultural requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of establishing or running a micro business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • portfolio of evidence relating to the development of the candidate's own business idea • review of report on an existing micro or small business known to the candidate • oral or written questioning to assess knowledge of research methods and data collection tools • review of market information gathered to identify possible market needs in relation to business ideas • assessment of reviewof trends and developments and their potential impact on business ideas.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB302A Develop a micro business proposal.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different

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RANGE STATEMENT	
work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Business ideas may be influenced by:	• amount and type of finance available • cultural, family and/or community expectations • expected financial viability • finance required • lifestyle sought • number and type of competitors • returns expected or required by owner • skills of owner/operator
Appropriate sources may include:	• Aboriginal and cultural councils and incorporated bodies • accountants • Australian Bureau of Statistics • business advisory services • business brokers • business consultants • business incubators • business mentors and peers • current affairs • databases • financial institutions • government agencies set up to provide and assist business development for example Indigenous Business Australia (IBA), Business Entry Point (www.business.gov.au) • industry/trade associations • internet • lawyers and providers of legal advice • local councils • friends, family and community • market research publications • national and international publications • online gateways • role models and other successful businesses • training providers
Customer information may	• customer characteristics

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RANGE STATEMENT	
include:	• marketing issues to meet needs • specialised needs of customers
Primary sources may include:	• group interviews • market testing a segment of the market • interviews (face-to-face and telephone) • observation • questionnaires • samples • surveys
Secondary sources may include:	• chambers of commerce data • data held by research and industry specific organisations • polls published by advertising and media companies • published government statistics • university databases

Ethical and cultural requirements may include:	• codes of practice
	• cultural expectations and influences
	• ethical principles
	  • government policies and guidelines
	  • societal expectations
	  • social responsibilities, for example protection of children, environmental issues

New and emerging markets may include:	• e-commerce • export market • niche or segment of the market not currently penetrated
Trends and developments may include:	• changes in technology • demographic trends • ecological/environmental trends • economic trends (local, regional, national, international) • government activities, fro example interest rates, deregulation • industrial trends • social and cultural factors

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB302A Develop a micro business proposal

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop an identified business idea, to research the feasibility of the business opportunity and to present a business idea in formats that suit a range of stakeholders. Specific legal requirements apply to the management of a micro business.

Application of the Unit

Application of the unit	This work will be undertaken by individuals who are establishing or operating a micro business providing for self employment.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Evaluate business opportunities	1.1. Identify and research ***key factors*** that influence viability of business ideas 1.2. Analyse business ideas in terms of personal or family needs and commitments 1.3. Evaluate impacts of emerging or changing technology, including e-commerce, on the business 1.4. Determine viability of business opportunity in line with perceived risks, resources available, financial returns and other outcomes sought 1.5. Assess and match ***personal skills***/***attributes*** against those perceived as necessary for a particular business opportunity 1.6. Identify and assess ***business risks*** according to resources available and personal preferences
2. Detail the business idea	2.1. Develop an ***accurate description of the business idea*** for ***key stakeholders*** 2.2. Develop an ***accurate summary of the major products and/or services*** required to suit personal needs and requirements
3. Prepare the business overview to suit different stakeholders	3.1. Present an accurate list of key stakeholders and their information requirements 3.2. Determine an acceptable ***method of presentation*** of information for each stakeholder

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ELEMENT	PERFORMANCE CRITERIA
	3.3. Provide accurate customised information to target audiences

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to assess personal attributes and to identify business risks, for example, to conduct a strengths, weaknesses, opportunities, threats (SWOT) analysis • communication skills to present information in an appropriate format for the audience • literacy skills to enable interpretation of business information • numeracy skills to analyse data to aid research • research skills to investigate the feasibility of a business opportunity.
Required knowledge
• commonwealth, state/territory and local government legislative requirements relating to business operation, especially in regard to occupational health and safety (OHS) and environmental issues, equal employment opportunity, industrial relations and anti-discrimination • income and expenditure costing • regulations and codes of practice relevant to the business operation • principles of risk assessment relevant to the business opportunity.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential:

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EVIDENCE GUIDE	

competency in this unit	• accurate and complete outline of the business idea that considers the major elements of:
	  • products/services
	  • customers
	  • operations and processes
	  • income and expenditure
	  • resources
	  • marketing
	  • location
	• evaluation of research results and assessment of the likely viability and practicability of a business opportunity, taking into account the current business/market climate and resources available
	• effective presentation of business idea and profile
	• knowledge of relevant legislative requirements affecting business operation.

Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of establishing or running a micro business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • oral or audio-visual presentation of business proposal, depending on the proposed stakeholder/s • portfolio of evidence including an outline of the business idea, evaluation of viability based on research and presentation of the business idea in an appropriate format for the proposed stakeholder/s • oral or written questioning to assess knowledge of regulations and codes of practice relevant to the business operation • review of list of key stakeholders and their information requirements.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB301A Investigate micro business opportunities.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Key factors may include:	• economy
	• infrastructure requirements
	• legal requirements and licensing
	• market competition
	• opportunities available
	  • resources and premises/location available
	  • risks related to a particular business opportunity, especially in regard to OHS and environmental considerations set up costs, time and effort
	  • skills available
	  • timing/cyclical considerations

Personal skills*/*attributes may include:	• business knowledge and skills • communication skills • entrepreneurship • financial knowledge and skills • technical and/or specialist skills • willingness to explore opportunities
Business risks may be affected by and may include:	• cultural, community and/or family factors • market competition • market trends • OHS and environmental considerations • relevant legislative requirements • resources available • security of investment • security of premises/location • supply and demand
Accurate description of the business idea includes:	• business type and location such as: • specific aspects of type of business, for example newsagency, clothes retailing, toy

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RANGE STATEMENT	
	manufacturing, tourism venture, heritage consultant • type or field of business, for example consulting, manufacturing, retailing • where the business will operate from • overall purpose of the business general scope such as: • address community or social justice objectives • maximise profits and personal wealth • provide employment opportunities for self, family or community members • provide not-for-profit goods and services for the community • retain linkages to land or locality
Accurate summary of the major products and/or services includes:	• customer and market description such as: • customer characteristics • marketing issues to meet needs • specialised needs of customers • overall predicted costs including: • capital • distribution costs • insurance • maintenance • overheads • production costs • supply costs • overall predicted income such as: • grants • interest on investments • loans • supply or sales of products or services • tax incentives • processes or operations such as: • how business might be structured • what ethical or cultural principles and protocols will guide the running of the business • what major activities the business will

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RANGE STATEMENT	

	undertake
	• resources such as:
	  • capital
	  • cultural knowledge
	  • equipment
	  • premises
	• skills and abilities

Key stakeholders may include:	• business and community members and organisations • councils (local, land and other) • customers • Elders, traditional owners, native Title holders • family members • funding bodies/banks/lending institutions • Indigenous, culturally and linguistically diverse organisations • suppliers
Preparing the business overview may mean determining:	• appropriate medium for presentation, such as oral or visual presentation, video, written documentation, developing a web page • best style of presenting the information, such as using plain English, using first language, joint presentation with key stakeholders • most suitable information to include in different versions of the overview • order of information to best suit the needs and interests of the audience • time and location that best suits the target audience needs and their importance
Method of presentation includes:	• main characteristics of the method • reasons for the method and any cultural considerations
Presentation may be via:	• formal written business proposal • oral or visual presentation • video

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB303A Organise finances for the micro business

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to investigate the financial capacity to enter into a micro business, to determine the projected cash flow, to source finances and to monitor the profitability of the business. Specific legal requirements apply to the management of a micro business.

Application of the Unit

Application of the unit	This work will be undertaken by individuals who are establishing or operating a micro business providing for self employment.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Ascertain own financial position and the ability to provide capital/equity for the business	1.1. Realistically detail ***personal***, ***family or community financial situation*** in terms of funds available and commitments already incurred 1.2. Determine equity finance and assets available for micro business from personal, family or community sources
2. Determine projected cash flow for the business	2.1. Determine the level of forecast business activity over a year and the business mix 2.2. Estimate ***establishment costs*** for the business and repayment schedule for borrowings 2.3. Calculate the monthly variable and fixed costs needed to conduct business activity over a year 2.4. Estimate personal drawings needed to be taken from the business 2.5. Estimate the monthly income generated by the business for a year based on price per unit item or hourly charge rate for labour 2.6. Develop a cash flow budget for the first year of business operation 2.7. Seek ***professional advice*** to estimate goods and services tax and operating finance required for the business
3. Source the required	3.1. Estimate required funding to establish and run the

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ELEMENT	PERFORMANCE CRITERIA
funds to establish the business	business based on expected sales and activity levels, available finances and commitments 3.2. Investigate methods of accessing alternative ***sources of finance*** 3.3. Identify strategies for meeting financial obligations 3.4. Implement plans to access available funds as required
4. Monitor profitability of the business	4.1. Maintain and review monthly expenditure and income records 4.2. Compare equity at beginning and end of a year to estimate business performance 4.3. Assess the ***financial viability*** of the business after a year of operation 4.4. Seek professional advice on depreciation, insurance and tax implications of the business

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to determine the viability of the business • literacy skills to interpret financial reports and to complete relevant forms requested by financial bodies • numeracy skills to calculate basic revenue and expense forecasts, and to estimate the funding needed to establish and run the business • research skills to source financial information.
Required knowledge
• basic budgeting • basic costing for the business • financial commitments and requirements • financial reports and terminology • methods and relative costs of obtaining finance • own financial position • sources of advice and assistance.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • investigation of own financial position and needs • investigation of projected cash flow for the business • estimation of the funding needed to establish and operate the business • assessment of the financial viability of the business • knowledge of basic budgeting.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of establishing or running a micro business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • problem-solving scenario which requires candidate to assess the financial viability of a proposed micro business in candidate's geographical location; the scenario should include opportunities for the candidate to calculate expenses and commitments against expected income • oral or written questioning to assess knowledge of financial reports and terminology • review of estimated establishmentcosts for the business and repayment schedule for borrowings • review of plans implemented to access available funds.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB302A Develop a micro business proposal • BSBSMB304A Determine resource requirements for the micro business.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Personal**, **family or community financial situation may include:	• education and other expenses • equity available through capital, savings and assets • existing loan repayments and/or other debt repayments • family, community or cultural commitments and obligations • living expenses such as rent, food, clothing for self and family
Establishment costs may include:	• capital equipment • insurance costs • purchase price • start-up costs
Professional advice may include:	• accountants • business brokers/business consultants • government agencies • industry/trade associations • online gateways • mentors

Sources of finance may include:	• banks and/or other finance providers
	• business finance
	• family or community equity
	• family or community loans/resources
	• government grants and other sources
	• personal equity
	  • private capital
	  • royalties
	  • venture capital

Financial viability may include:	• return on capital • return on labour

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB304A Determine resource requirements for the micro business

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to determine the resource requirements of the micro business and to source these resources. Specific legal requirements apply to the management of a micro business.

Application of the Unit

Application of the unit	This work will be undertaken by individuals who are establishing or operating a micro business providing for self employment.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify the resources needed in the business	1.1. Use the business profile to determine the ***types of resources*** that may be required in the business 1.2. Gather ***information regarding resource requirements***, from appropriate sources 1.3. Determine resource quantities in accordance with business activity levels and financial position
2. Select appropriate sources for resources required in the business	2.1. Investigate different ***options for acquiring resources*** needed in the business in terms of business profile and stakeholder needs 2.2. Determine reliability, risks and costs associated with these options in line with business projections 2.3. Determine ease of access to sources of service and support 2.4. Select suitable options as investigated 2.5. Establish relationships with suppliers and other key people
3. Prepare for the use of resources in the business	3.1. Design ***procedures and systems*** to allow for the effective and efficient introduction, use and maintenance of resources 3.2. Negotiate and review arrangements for supply of resources to ensure the business profile is met 3.3. Design procedures for monitoring the use of resources

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Develop procedures for the maintenance, support, repair and replacement of business machinery, equipment and software

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to negotiate contracts; to make initial and to maintain ongoing, contact with suppliers; to explain processes/procedures to contractors or employees (where relevant) • literacy skills to produce simple instructions for a particular routine task • numeracy skills to calculate resource/equipment expenditure • research skills to investigate the resources needed for the business and options for acquiring them • technology skills to select and use technology appropriate to a task.
Required knowledge
• commonwealth, state/territory and local government legislative requirements relating to business operation, especially in regard to occupational health and safety (OHS) and environmental issues, equal employment opportunity, industrial relations and anti discrimination • functions of a range of business equipment and machinery (including information technology/communications systems and software) • organisation's business profile and structure • procedures and systems for the use of and routine maintenance of resources • types of resources that would be required as per the business profile.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • knowledge of types of resources required by the business • determining appropriate resource levels in line with business profile and desired profit • selecting options for resource acquisition suited to the business and financial position • developing procedures and systems to allow for the efficient and effective installation, use and maintenance of resources.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of establishing or running a micro business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • oral or audio-visual presentation of a case study requiring the candidate to determine resources needed to operate a specific micro business in a field and location relevant to the candidate • portfolio of evidence including identified and required resources, and options for their acquisition • oral or written questioning to assess knowledge of relevant legislation from all levels of government that affects small business operation • review of resource quantities determined • review of procedures developed for the maintenance, support, repair and replacement of business machinery, equipment and software.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB302A Develop a micro business proposal • BSBSMB303A Organise finances for the micro business • BSBSMB306A Plan a home-based business.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Types of resources may include:	• consumables • equipment • facilities • human resources • machinery • materials • software • vehicles
Information regarding resource requirements includes:	• costs • delivery • set up

Options for acquiring resources may include:	• hiring
	• leasing
	  • outsourcing
	  • purchasing

Procedures and systems may include:	• budgeting limits and approval process • delivery and receipt of stock and materials • developing and monitoring resource contracts • installation and support for IT/communications equipment and software • installation of machinery and equipment • maintenance and repair of machinery and equipment • ordering of stock and materials • recruitment, induction and supervision of personnel (employees or contractors) • storage of stock and materials

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB305A Comply with regulatory, taxation and insurance requirements for the micro business

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to outline the regulatory, taxation and insurance compliance requirements of a micro business; and to source advice and specialist services to assist business owners/managers in satisfying these requirements and needs. Specific legal requirements apply to the management of a micro business.

Application of the Unit

Application of the unit	This work will be undertaken by individuals who are establishing or operating a micro business providing for self employment.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify the regulatory, taxation and insurance requirements of the business	1.1. Identify ***regulatory***, ***taxation and insurance requirements*** that might be relevant to the operation of the business 1.2. Gather ***information*** that assists in interpreting and explaining the regulatory, taxation and insurance requirements 1.3. Investigate the relationships between legislation, regulations, codes of practice, associated standards and written material to determine compliance requirements of the business
2. Develop procedures to ensure compliance and risk minimisation	2.1. Identify business advisers and other sources of assistance relevant to compliance requirements and type of business 2.2. Explain to advisers business type and operations, covering the full scope of the business 2.3. Clarify and confirm compliance requirements and risk minimisation needs with advisers 2.4. Establish ***sources of advice and specialist services*** for regulatory, taxation and insurance compliance 2.5. Review advice and procedures against the compliance requirements and their appropriateness for the business
3. Implement compliance	3.1. Implement procedures within the guidelines

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ELEMENT	PERFORMANCE CRITERIA
procedures	provided 3.2. Take action to ensure that the business complies with the relevant taxation and business registration requirements, legislation, regulations, codes of practice and associated standards 3.3. Arrange appropriate insurance cover for the business

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to question and seek clarification from advisers on regulatory, taxation or insurance matters
- literacy skills to interpret relevant regulatory, taxation and insurance information
- research skills to investigate compliance requirements.

Required knowledge

- business registration and licensing requirements
- commonwealth, state/territory and local government legislative requirements relating to business operation, especially in regard to occupational health and safety (OHS) and environmental issues, equal employment opportunity, industrial relations and anti-discrimination
- nature of legal responsibility
- relevant industry codes of practice
- relevant OHS responsibilities and procedures
- sources of advice and specialist services
- sources of information about regulatory, taxation and insurance requirements and issues
- taxation requirements.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification of regulatory, taxation and insurance compliance requirements and risk minimisation needs of the business • identification of sources of advice on compliance and risk minimisation procedures for the business • development and review of procedures for compliance and risk minimisation (with assistance from advisers) • knowledge of legislative requirements affecting business operation.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of establishing or running a micro business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • oral or audio-visual presentation of a case study of a micro business in similar field and location as candidate's proposal • portfolio of evidence including identification of relevant compliance and risk minimisation needs for the micro business, and development of risk minimisation and compliance procedures (with assistance from advisers) • review of implementation of procedures • review of insurance cover arranged for the business.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB302A Develop a micro business proposal.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Regulatory, taxation and insurance requirements may include:	• local, state/territory, commonwealth and international legislation, regulations and codes of practice affecting business operations such as: • Acts and regulations • industry and OHS codes of practice • business registrations and licences • planning and other permissions • environmental legislation • industrial law, agency law, property law, consumer legislation and standards, Torts Law and duty of care • equal employment opportunity (EEO) and anti-discrimination legislation • anti-competition regulations
Information gathered may include:	• government agencies • industry associations • internet • written material
Taxation requirements may include:	• Australian Business Number • Business Activity Statement and goods and services tax (GST) returns • GST registration • PAYG and withholding arrangements • tax file number
Insurance requirements may include:	• comprehensive insurance for vehicles/property • professional indemnity insurance • public liability insurance • third party insurance on motor vehicles • workers compensation • other insurance cover as required by state/territory or commonwealth legislation, contractual obligations or as recommended for

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RANGE STATEMENT	
	the industry/type of business

Sources of advice and specialist services may include:	• accountants
	  • business advisers
	  • financial planners and insurance brokers
	  • funding bodies
	  • government agencies (for example, Indigenous Business Australia, Office of Aboriginal Economic Development)
	  • industry/trade associations
	  • insurance brokers
	• lawyers

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB306A Plan a home based business

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to examine the issues around establishing a business in a home and to plan the workplace within a home environment. Specific legal requirements apply to the management of a small or micro business.

Application of the Unit

Application of the unit	This work will be undertaken by individuals who are establishing or operating a micro business providing for self employment.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Determine the viability of basing a business in a home environment	1.1. Identify ***activities*** that will be undertaken by the business and what facilities and workspace are needed 1.2. Identify what ***licences***, ***permits***, ***regulations or restrictions*** apply to operating a home-based business 1.3. Identify the availability of ***services and infrastructure*** to support the business 1.4. Calculate the costs of suitable ***fittings and equipment*** for the business and any modifications required to existing facilities and infrastructure in the home 1.5. Determine access requirements of clients or delivery vehicles to the business premises 1.6. Identify insurance requirements for operation of the business in the home
2. Plan the workplace in a home environment	2.1. Prepare a floor plan or layout that meets the needs of the business and the home occupants 2.2. Prepare any concept plans for modifications to buildings or structures in accordance with local government requirements 2.3. Obtain ***approvals*** from relevant authorities 2.4. Identify occupational health and safety (OHS) issues and develop ***procedures*** to eliminate or minimise

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ELEMENT	PERFORMANCE CRITERIA
	any risks 2.5. Design the workplace to provide appropriate ***client access and facilities*** while retaining privacy for home occupants 2.6. Allocate adequate and secure space for business machinery, equipment and storage of materials
3. Minimise potential sources of conflict	3.1. Identify possible ***sources of conflict*** with neighbours or home occupants 3.2. Develop ***protocols*** for home occupants, visitors and clients to enable the business to successfully operate in the home environment 3.3. Prepare a work schedule that identifies ***business and personal activities*** 3.4. Establish contingency plans for ***unanticipated events***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to clarify restrictions and approvals; to negotiate with neighbours, home occupants, trades people and suppliers; to formulate questions to obtain quotes • literacy skills to understand and complete any relevant forms relating to a home-based business • research skills to locate and access sources of information relating to restrictions/approvals for a home-based business.
Required knowledge
• aspects of the business being proposed • commonwealth, state/territory and local government legislative requirements relating to business operation, especially in regard to occupational health and safety (OHS) and environmental issues • constraints of home-based businesses • relevant services and infrastructure available.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • identification of why the particular business is best established in the home • identification and selection of useful strategies in planning the set up of a home-based business • knowledge of constraints of home-based businesses.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of establishing or running a home-based business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • portfolio of evidence including floor layout and quotes for work • oral or written questioning to assess knowledge of relevant legislation • review of access requirements determined for clients or delivery vehicles to the business premises • review of protocols developed for home occupants, visitors and clients • analysis of contingency plans established for unanticipated events.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB302A Develop a micro business proposal • BSBSMB304A Determine resource requirements for the micro business.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Activities may include:	• any products produced by the business • if the business includes only one aspect of a process • if the business is an adjunct to something else
Licences, ***permits***, ***regulations or restrictions*** may include:	• funding agency restrictions • local government regulations • state/territory government environmental regulations/restrictions
Services and infrastructure may include:	• disability access • gas • mobile phone coverage • phone/internet access • postal services • power • supply of materials and packaging • vehicle access • water
Fittings and equipment may include:	• furniture desk, chairs, work benches • hardware/software • storage for example shelving, cabinets/freezers/machinery, shed
Approvals may be needed from:	• body corporate (if rented unit) or owner (if the house is rented) • public liability/WorkCover
Procedures may include:	• verbal instructions • visual images • written signs
Client access and facilities may include:	• dedicated area for consultation with clients/staff and /or display area • entry • parking • signage

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RANGE STATEMENT	
	• toilets
Sources of conflict may include:	• changes in home occupants' needs for space • noise • parking • waste
Protocols may include:	• informal understandings • verbal instructions
Business and personal activities may include:	• community and family responsibilities • personal networking/mentoring
Unanticipated events may include:	• attendance at events (community, family conferences, training) • personal and/or family illness

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB307A Set up information and communications technology for the micro business

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish information and communications technology needs relevant to a home based business. It focuses on dealing with routine installation, operation and malfunctions of commonly used technology only; it is not a specialist information technology unit. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This work will be undertaken by individuals who are establishing or operating a micro business providing for self employment.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Determine information and communications technology requirements	1.1. Identify the full range of ***hardware and software requirements*** relevant to the anticipated start-up level of business and available space 1.2. Determine and decide on the type of ***internet connection*** needed to fulfil business requirements 1.3. Identify suitable suppliers of hardware and software and appropriate ***support services*** 1.4. Compare and analyse pricing and payment options to determine the most suitable information and communications technology goods and services for the business
2. Install hardware and software products	2.1. Determine suitable location for hardware, taking into account ***occupational health and safety*** (***OHS***) ***and environmental considerations*** 2.2. Follow set up instructions for hardware in accordance with ***manufacturers' specifications*** 2.3. Follow instructions on installation for all software applications and upgrades 2.4. Install and test the ***connection device*** in accordance with vendor instructions
3. Trouble shoot/resolve common malfunctions	3.1. Define the problem to be resolved 3.2. Identify support services for ***common malfunctions*** 3.3. Follow instructions for resolving common

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ELEMENT	PERFORMANCE CRITERIA
	malfunctions 3.4. Test device to ensure the malfunction is resolved

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to clearly and succinctly identify the problem with the technology and to negotiate with support service personnel and vendors • literacy skills to locate and understand key information in warranty and support services documents and to compare varying plans for internet service provision • numeracy skills to compare prices for similar technology • problem-solving skills to follow and act on verbal, written and/or diagrammatic instructions in relation to installing hardware/software and resolving routine malfunctions • technology skills to operate a personal computer.
Required knowledge
• basic computer vocabulary required to identify the problem areas for support • characteristics and compatibility of hardware and software • OHS procedures for electrical equipment • current, relevant software packages for work requirements • technology security requirements.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential: • following oral and written/diagrammatic instructions

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EVIDENCE GUIDE	
competency in this unit	to install hardware and software • identifying and selecting appropriate hardware/software • identifying and resolving common malfunctions • knowledge of technology security requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of establishing or running a micro business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • demonstration of practical skills such as connecting hardware following diagrammatic/written instructions • portfolio of evidence including analysis of information and communications technology systems, their costs and proposed selected system • oral or written questioning to assess knowledge of resolving malfunctions of commonly used technology • review of location determined for hardware.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBITU101A Operate a personal computer • BSBSMB306A Plan a home-based business.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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RANGE STATEMENT	
Hardware and software requirements may include:	• computers (desktop, notebook), monitor, keyboard • current relevant software applications (for example MS Word, MS Excel) • data protection including backing up files • facsimile machine • photocopier • photographic equipment (to photograph goods for selling on the internet) • security requirements such as anti-virus software, password, pin • telephone, mobile
Internet connection may include:	• broadband, wireless, dial-up, cable, satellite (depending on availability in the area) • configuration of email address (for example web address versus free address) • internet service provider
Support services may include:	• informal networks and mentors • manuals, books, journals • manufacturers' specifications • online help • professional support service personnel • training programs, tutorials • vendor help desk for software and hardware; internet service provider help desk support
Occupational health and safety and environmental considerations may include:	• disposal of redundant hardware and consumables • ergonomics • lighting • placement of extension chords • placement of hardware in terms of potential fire hazard and location of appropriate fire extinguisher • ventilation
Manufacturers' specifications may include:	• diagrammatic instructions • written instructions
Connection device may include:	• asymmetric digital subscriber line (ADSL) • cable modem • modem
Common malfunctions may	• cannot access the internet/email

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RANGE STATEMENT	
include:	• computer screen freezes • printer paper jam

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB401A Establish legal and risk management requirements of small business

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify and comply with the regulatory, legal, taxation and insurance requirements, and risk management needs of small business. Specific legal requirements apply to the management of a small business.

Application of the Unit

Application of the unit	This work is undertaken by individuals who operate a small business. The unit is suitable for existing micro and small businesses or setting up a new business or a department in a larger organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify and implement business legal requirements	1.1. Identify and research possible ***options for the business legal structure*** using ***appropriate sources*** 1.2. Determine ***legislation and regulatory requirements*** affecting the operations of the business under its chosen structure 1.3. Develop and implement procedures to ensure full compliance with relevant legislation and regulatory requirements
2. Comply with legislation, codes and regulatory requirements	2.1. Establish systems to ensure the ***legal rights and responsibilities*** of the business are identified and the business is adequately protected, specifically in relation to ***occupational health and safety*** (***OHS***), business registration and environmental requirements 2.2. Identify ***taxation principles and requirements*** relative to the business and follow procedures to ensure compliance 2.3. Identify and carefully maintain ***legal documents*** and maintain and update relevant ***records*** to ensure their ongoing security and accessibility 2.4. Monitor the provision of products and services of the business to protect legal rights and to comply with legal responsibilities 2.5. Conduct investigations to identify areas of

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ELEMENT	PERFORMANCE CRITERIA
	non-compliance with legal and regulatory requirements and take corrective action where necessary
3. Negotiate and arrange contracts	3.1. Seek legal advice on contractual rights and obligations, if required, to clarify business liabilities 3.2. Investigate and assess potential products/services to determine ***procurement rights*** and to ensure protection of business interests where applicable 3.3. Negotiate and secure contractual procurement rights for goods and services including ***contracts with relevant people***, as required, in accordance with the business plan 3.4. Identify ***insurance requirements*** and acquire adequate cover 3.5. Identify options for leasing/ownership of business premises and complete contractual arrangements in accordance with the business plan

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication, reporting, record keeping and consultation skills to operate the business
- literacy skills to interpret legal requirements, to develop policies and procedures and to analyse compliance information
- research skills to investigate legal structures, and taxation and insurance requirements
- time management skills to prioritise tasks and to meet key dates.

Required knowledge

- business registration and licensing requirements
- commonwealth, state/territory and local government legislative requirements relating to business operation, especially in regard to OHS and environmental issues, equal employment opportunity, industrial relations, anti-discrimination, taxation
- creation and termination of relevant legal contracts

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REQUIRED SKILLS AND KNOWLEDGE
• cultural differences and legal implications • duty of care imposed by Law of Torts • legal rights and obligations of alternative ownership structures • record keeping to meet minimum legal and taxation requirements • relevant consumer legislation • relevant industry codes of practice • relevant insurance requirements and products.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • implementation of a systematic approach to identifying, managing and meeting legal and business requirements within culturally appropriate contexts • interpreting compliance data and formulating appropriate action • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of establishing or running a small business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • portfolio of evidence including contracts negotiated and arranged • oral or written questioning to assess knowledge of relevant consumer legislation • review of procedures developed and implemented to ensure full compliance with relevant legislation and regulatory requirements

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EVIDENCE GUIDE	
	• review of insurance cover acquired.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB402A Plan small business finances • BSBSMB404A Undertake small business planning.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Options for the business legal structure may include:	• company • cooperative • corporation • government owned enterprise • partnership • profit or not-for-profit legal structure • sole trader • trust
Options for the business legal structure may be influenced by:	• confidentiality • contractual requirements • family/community/cultural expectations • ownership transfer • partnership considerations • preferences of owners/stakeholders • protection of stakeholders and assets • requirements of financial backers • superannuation • taxation
Appropriate sources may include:	• business advisers • financial planners • government agencies

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RANGE STATEMENT	
	• industry/trade associations • mentors • professional advisers (e.g. solicitors, accountants)

Legislation and regulatory requirements may include:	• local, state/territory, commonwealth and international legislation, regulations and codes of practice affecting business operations such as:
	  • relevant Acts and regulations
	  • industry and OHS codes of practice
	  • business registrations and licences
	  • planning and other permissions
	  • environmental legislation
	  • industrial law, agency law, property law, consumer legislation and standards, Torts Law and duty of care
	  • equal employment opportunity (EEO) and anti-discrimination legislation, anti-competition regulations

Legal rights and responsibilities may include:	• culturally appropriate processes and protocols • marketing the business in accordance with consumer legislation • obligations imposed by choice of business structure • operating the business with a duty of care (Law of Torts)
Occupational health and safety and requirements must include:	• complying with relevant OHS codes of practice • establishing and maintaining a system for managing OHS • establishing hazard management arrangements to assess and control the risks associated with workplace hazards including development of written safe operating procedures • establishing OHS record keeping arrangements in accordance with regulatory requirements • OHS duty of care responsibilities • registering with state/territory workers compensation authority if applicable
Taxation principles and requirements may include:	• relevant taxation requirements/obligations for business • tax file number, Australian Business number, goods and services tax registration, PAYG and

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RANGE STATEMENT	
	withholding arrangements
Legal documents may include:	• appropriate software for financial records • certificate of incorporation • constitution documents • franchise agreements and financial documentation • partnership agreements • statutory books for companies (register of members, register of directors and minute books)
Records may include:	• environmental • financial • OHS • personnel • taxation
OHS records may include:	• accident reports and investigations • first aid and medical • hazardous substances register • instruction and training • manufacturers' and suppliers' information • material safety data sheets • OHS audits and inspections • plant maintenance and testing • workers compensation and rehabilitation
Procurement rights to products and services may include:	• any form of licensing • royalties, copyright, patents, trademarks, registered design and applications, intellectual property, software licenses, franchises, agencies
Contracts with relevant people may include:	• any person with whom the business has, or seeks to have, a performance-based relationship • owners, suppliers, employees, landlords, agents, distributors, customers
Insurance requirements may include:	• comprehensive insurance for vehicles/property • professional indemnity insurance • public liability insurance • third party insurance on motor vehicles • workers compensation • other insurance cover as required by state/territory or commonwealth legislation,

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RANGE STATEMENT	
	contractual obligations or as recommended for the industry/type of business

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB402A Plan small business finances

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop a financial plan to support business viability. Specific legal requirements apply to the management of a small business.

Application of the Unit

Application of the unit	This work is undertaken by individuals who operate a small business. The unit is suitable for existing micro and small businesses or a department in a larger organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify costs, calculate prices and prepare profit statement	1.1. Identify and document ***costs*** associated with the production and delivery of the business' products/services 1.2. Calculate prices based on costs and profit margin, as an hourly charge out rate for labour or unit price for products 1.3. Calculate break-even sales point to establish business viability and profit margins 1.4. Identify appropriate ***pricing strategies*** in relation to market conditions to meet business profit targets 1.5. Prepare projected profit statement to supplement the business plan
2. Develop a FINANCIAL PLAN	2.1. Set ***profit targets***/***goals*** to reflect owner's desired returns 2.2. Identify working capital requirements necessary to attain profit projections 2.3. Identify non-current asset requirements and consider alternative asset management strategies 2.4. Prepare ***cash flow projections*** to enable business operation in accordance with business plan and ***legal requirements*** 2.5. Identify capital investment requirements accurately for each operational period 2.6. Select budget targets to enable ongoing monitoring of financial performance
3. Acquire finance	3.1. Identify start-up and ongoing financial requirements according to financial plan/budget

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ELEMENT	PERFORMANCE CRITERIA
	3.2. Identify ***sources of finance***, including potential ***financial backers***, to provide required liquidity for the business to complement business goals and objectives 3.3. Investigate cost of securing finance on optimal terms 3.4. Identify strategies to obtain finance as required to ensure financial viability of the business

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to interpret financial data
- communication skills to secure finance
- literacy skills to develop a financial plan and to interpret legal requirements and financial reports
- numeracy skills to calculate costs, prices, profit and other financial information
- research skills to identify costs and sources of finance.

Required knowledge

- break-even analysis
- costing for the business, including margin/mark-up, hourly charge out rates and unit costs
- financial decision making relevant to the business
- methods and relative costs of obtaining finance
- principles for preparation of balance sheets
- principles for preparation of cash flow forecasts
- principles for preparation of profit and loss statements
- purpose of financial reports
- relevant accounting terminology
- working capital cycles.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of a financial plan which identifies the financial requirements of the business, including profit targets, cash flow projections and strategies for the acquisition of finance • knowledge of financial decision making relevant to the business.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of establishing or running a small business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • portfolio of evidence including financial plan and records • review of projected profit statement prepared to supplement the business plan • review of cash flow projections • oral or written questioning to asses knowledge of principles for preparation of cash flow forecasts.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB401A Establish legal and risk management requirements of small business • BSBSMB404A Undertake small business planning • BSBSMB405A Monitor and manage small business operations • BSBSMB406A Manage small business finances.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Costs may include:	• direct/indirect costs • fixed, variable, semi-variable costs • overheads and employee costs
Pricing strategies may include:	• competitor analysis • cost/volume/profit analysis • cost factors • cost plus pricing • demand-based pricing • discounting • market conditions • penetration pricing • perceived value • product mix • skimming
Financial plan may include:	• analysis of sales by product/service, identifying where they were sold and to whom • cash flow estimates for each forward period • current financial state of the enterprise (or owner/operator) • estimates of profit and loss projections for each forward period • financial performance to date (if applicable) • likely return on investment • monthly, quarterly or annual returns • non-recurrent assets calculations • profit, turnover, capital and equity targets • projected profit targets, pricing strategies, margins • projections of likely financial results (budgeting) • projections, which may vary depending on the importance of such information and the stage in the life of the business • resources required to implement the proposed marketing and production strategies (staff,

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RANGE STATEMENT	
	materials, plant and equipment) • review of financial inputs required (sources and forms of finance) • risks and measures to manage or minimise risks • working, fixed, debt and equity capital • working in conjunction with external consultants e.g. investment analysts, accountants, financiers
Profit targets*/*goals may include:	• break-even point • cost of goods/services sold • gross profit/net profit • desired actual/notional salary for owners/managers • desired return on investment • sales turnover/gross fees or income
Cash flow projections may include:	• anticipated payments • anticipated receipts • customer credit policy/debt recovery • taxation provisions
Legal requirements may include:	• contractual arrangements (partnership agreements, trust deeds) • corporations law • industrial law (for payroll records) • taxation law
Sources of finance may include:	• personal, financial institutions, trade/industry sources • government sources, for example commonwealth and state/territory governments which provide various forms of technical and financial assistance including direct cash grants, loans, subsidies, tax concessions, and professional and technical advice
Financial backers may include:	• financiers/banks/lending institutions • leasing and hire purchase financiers • providers of venture capital • shareholders/partners/owners/family/friends

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB403A Market the small business

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and implement marketing strategies, and to monitor and improve market performance. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This work is undertaken by individuals who operate a small business. This unit is suitable for micro and small businesses or a department in a larger organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop marketing strategies	1.1. Analyse the business and its key products or services to determine the focus of marketing activities, in accordance with the objectives of the business plan 1.2. Evaluate the customer base and target market for the small business as a basis for the ***marketing objectives and strategies*** 1.3. Determine marketing objectives and strategies that are ethically and culturally appropriate, in consultation with ***relevant people*** and in accordance with the business plan
2. Determine a marketing mix for the business	2.1. Balance product mix, volumes and pricing to optimise sales and profit 2.2. Evaluate the costs and benefits of using different ***distribution channels*** and/or providing different ***levels of customer service*** and consider the results in determining the ***marketing mix*** 2.3. Determine promotional activities to suit the target market 2.4. Consider customer needs and preferences in determining the marketing mix 2.5. Determine the marketing mix according to market and business needs
3. Implement marketing	3.1. Brief persons involved in the marketing effort on their roles and responsibilities, to ensure the success

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ELEMENT	PERFORMANCE CRITERIA
strategies	of marketing strategies 3.2. Plan and implement ***promotional activities***, in accordance with marketing objectives and budgetary requirements
4. Monitor and improve marketing performance	4.1. Monitor marketing activities and evaluate business performance according to the objectives and targets of the business plan 4.2. Analyse ***performance gaps*** and take corrective action or set new targets 4.3. Encourage all relevant people to propose ways to improve marketing performance 4.4. Seek and analyse ***customer reaction*** to all aspects of the marketing mix, using culturally appropriate processes, to improve targeting and outcomes 4.5. Conduct ongoing research of customer requirements to identify opportunities for change and improvement 4.6. Monitor and investigate changes in the market for new opportunities to aid business development

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to question, clarify and report • literacy and numeracy skills to research information, to analyse data and to interpret market data.
Required knowledge
• industry market trends • methods of analysing costs and benefits of marketing strategies • methods of developing marketing objectives and marketing mix • methods of monitoring customer satisfaction • relevant market analysis and research • relevant marketing concepts and methods.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing a marketing strategy and choosing a marketing mix for the small business that are culturally appropriate and that complement the business plan • implementing and monitoring the marketing strategy/plan to optimise the chances of small business success • knowledge of relevant marketing concepts and methods.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of running a small business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • portfolio of evidence including marketing strategy and monitoring of marketing performance • oral or written questioning to assess knowledge of industry market trends • review of analysis of performance gaps and corrective action taken or new targets set • review of promotional activities implemented.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB404A Undertake small business planning.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Marketing objectives and strategies may include:	• achieving lower costs of production and distribution than competitors • creating a very different product line or service so that the business becomes a class leader in the industry • distribution • pricing, presentation and display of products/services • product design and packaging • product range and mix • promotion and advertising • pursuing cost leadership and/or product differentiation within a specialist market segment
Relevant people may include:	• accountant or other specialist services • family members, work team members, sub-contractors, community members • franchise agency • financial backers, clients • owner/operator, partners, directors, shareholders • regulatory bodies • trade or industry associations
Distribution channels may include:	• dealer, re-seller, franchisee • distributor, delivery service, mail order, telesales • self-access, wholesale, retail
Levels of customer service may include:	• after sales service • one-on-one personal service • sales assistance for problems/queries only
Marketing mix may include:	• distribution • level of service • pricing

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RANGE STATEMENT	
	• promotion • quality, range • safety features • technical features, design
Promotional activities may include:	• advertising in national, suburban or local newspapers • advertising on radio or television • canvassing • development of networks and strategic alliances • display posters • exhibitions, in-store promotions • involvement in community projects • mail drops • professional/industry journals • sponsorship • staff development programs to enhance customer service orientation • website • word of mouth, referral, testimonials
Performance gaps may include:	• over achievement of performance targets • under achievement of performance targets
Customer reaction may be determined through:	• customer meetings, focus groups • identification of new business opportunities • informal discussion • sales to contact ratio • survey/other feedback mechanisms • trend analysis

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB404A Undertake small business planning

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to research and develop an integrated business plan for achieving business goals and objectives. Specific legal requirements apply to the management of a small business.

Application of the Unit

Application of the unit	This work is undertaken by individuals who operate a small business. This unit is suitable for micro and small businesses or a department in a larger organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify elements of the business plan	1.1. Identify purpose of the ***business plan***
	1.2. Identify and review the essential components of the business plan
	1.3. Identify and document ***business goals and objectives*** as a basis for measuring business performance
2. Develop a business plan	2.1. Research resources, legal and compliance requirements, specifically in relation to ***occupational health and safety*** (***OHS***), in accordance with business goals and objectives
	2.2. Research market needs, and market size and potential
	2.3. Identify sources and costs of finance, from the ***financial plan***, to provide required liquidity and profitability for the business
	2.4. Identify methods, from the ***marketing strategies***, to promote the market exposure of the business
	2.5. Identify methods/means of production/operation from the ***production***/***operations plan*** to conform with business goals and objectives
	2.6. Identify ***staffing requirements*** to effectively produce/deliver products/services
	2.7. Identify ***specialist services*** and sources of advice, where required, and cost in accordance with resources available
3. Develop strategies for minimising risks	3.1. Identify specific interests and objectives of ***relevant people*** and seek and confirm their support of the planned business direction
	3.2. Identify and develop ***risk management strategies***

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ELEMENT	PERFORMANCE CRITERIA
	according to business goals and objectives, and relevant legal requirements 3.3. Develop ***contingency plan*** to address possible areas of non-conformance with the plan

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to assess business performance • literacy skills to enable interpretation of business information • numeracy skills to analyse data.
Required knowledge
• commonwealth, state/territory and local government legislative requirements relating to business operation, especially in regard to OHS and environmental issues, equal employment opportunity, industrial relations and anti-discrimination • methods of evaluation • OHS responsibilities and procedures for identifying hazards relevant to the business • planning processes • preparation of a business plan • principles of risk management relevant to business planning • reasons for and benefits of, business planning • relevant industry codes of practice • setting goals and objectives • types of business planning - feasibility studies; strategic, operational, financial and marketing planning.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development of a business plan which provides for finance, marketing and provision of products/services to facilitate the business goals and objectives • identification of and planning for, OHS and duty of care responsibilities • development of risk management strategies • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of running a small business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • portfolio of evidence including a business plan and risk management strategies • oral or written questioning to assess knowledge of OHS responsibilities and procedures for identifying hazards relevant to the business • demonstration of practical skills • review of documented business goals and objectives • review of contingency plans developed to address possible areas of non-conformance with the business plan.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB401A Establish legal and risk management requirements of small business • BSBSMB402A Plan small business finances • BSBSMB403A Market the small business.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Business plan may include:	• business opportunities, which may be influenced by:
	  • amount and types of finance available
	  • expected financial viability
	  • skills of operator
	• details of ownership/management
	• finance, expenditure statement, balance sheet and cash flow forecast, projections for the initial years of operation assumptions underlying the business plan, expected level of inflation and taxation, expected trend of interest rate, capital expenditure and its timing, stock turnover, debtors collection period, creditor payment period, return on investment
	• level of risk involved, risk assessment and management
	• market focus of the business
	• marketing requirements
	• need to raise finance and requirements of lenders
	• organisation/operational arrangements
	• proposed size and scale of the business
	• recognition of any seasonal or cyclical (time-based) elements which are crucial to the success of the business
	• resources required and available
	• sources of funding
	• specialist services and sources of advice that may be required
	• staffing
	• stages in the business development

Business goals and objectives may include:	• customer needs/marketing projections • family or community benefits

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RANGE STATEMENT	
	• financial projections • goals, objectives, plans, systems and processes • lifestyle issues • market focus of the business • proposed size and scale of the business • short-, medium- or long-term goals • social responsibility
Occupational health and safety issues must include:	• identification of specific hazard issues such as occupational violence, security, manual handling, equipment and hazardous substances • management of the organisation and operation of OHS as part of the business plan • procedures for managing hazards in the workplace (identify, assess and control) • provisions for ensuring safety of members of the public and contractors visiting the premises/worksite
Financial plan may include:	• analysis of sales by product/service, identifying where they were sold and to whom • cash flow estimates for each forward period • current financial state of the enterprise (or owner/operator) • estimates of profit and loss projections for each forward period • financial performance to date (if applicable) • likely return on investment • monthly, quarterly or annual returns • non-recurrent assets calculations • profit, turnover, capital and equity targets • projected profit targets, pricing strategies, margins • projections of likely financial results (budgeting) • projections, which may vary depending on the importance of such information and the stage in the life of the business • resources required to implement the proposed marketing and production strategies (staff, materials, plant and equipment) • review of financial inputs required (sources

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RANGE STATEMENT	
	and forms of finance) • risks and measures to manage or minimise risks • working, fixed, debt and equity capital
Marketing strategies may include:	• achieving lower costs of production and distribution than competitors • creating a very different product line or service so that the business becomes a class leader in the industry • distribution • pricing, presentation and display of products/services • product design and packaging • product range and mix • promotion and advertising • pursuing cost leadership and/or product differentiation within a specialist market segment
Production/operations plan may include:	• customer requirements, market expectations, budgetary constraints • industrial relations climate and quality assurance considerations • means of supply and distribution • operational targets and action plan, which may include short-, medium- or long-term goals • options for production, delivery, technical and customer service and support
Staffing requirements may include:	• full-time, part-time staff, permanent, temporary or casual staff • owner/operator • sub-contractors or external advisers/consultants
Specialist services may include:	• accountants • business advisors and consultants • business brokers • contractors • government agencies • industry/trade associations • lawyers and providers of legal advice • mentors

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RANGE STATEMENT	
	• online gateways
Relevant people may include:	• clients • family members • franchise agency • owner/operator, partners, financial backers • regulatory bodies • suppliers • trade or industry associations
Risk management strategies may include:	• breach of contract, product liability • knowledge management • measures to manage risk including professional indemnity, securing appropriate insurance to cover loss of earnings through sickness/accidents, drought, flood, fire, theft • security systems to provide physical security of premises, plant, equipment, goods and services • security of intellectual property
Risk management strategies must include:	• OHS requirements
Contingency plan may include:	• disturbances to cash flow, supply and/or distribution • sickness or personal considerations

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Small and Micro Business

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Co-requisite units

Co-requisite units		

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BSBSMB405B Monitor and manage small business operations

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Required knowledge and Range Statement changed to include environmentally sustainable practices Replaces BSBSMB405A Monitor and manage small business operations

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to operate a small business and to implement a business plan. The strategies involve monitoring, managing and reviewing operational procedures.

Specific legal requirements apply to the management of a small business.

Application of the Unit

This work is undertaken by individuals who operate a small business.

The unit is suitable for existing micro and small businesses or a department in a larger organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Develop o***perational strategies and procedures***	1.1 Develop an action plan to provide a clear and coherent direction, in accordance with the ***business goals and objectives*** 1.2 Identify ***occupational health and safety (OHS) and environmental issues*** and implement strategies to minimise risk factors 1.3 Develop a ***quality system*** for the business in line with industry standards, compliance requirements and cultural criteria 1.4 Develop performance measures and ***operational targets*** to conform with the business plan 1.5 Develop strategies for innovation, including the utilisation of existing, new or emerging technologies, where practicable, to optimise business performance
2. Implement operational strategies and procedures	2.1 Implement systems and key performance indicators/targets to monitor business performance and customer satisfaction 2.2 Implement systems to control stock, expenditure/cost, wastage/shrinkage and risks to health and safety in accordance with the business plan 2.3 Maintain staffing requirements, where applicable, within budget to maximise productivity 2.4 Carry out the provision of goods/services in accordance with established legal, ethical cultural and ***technical standards*** 2.5 Provide goods/services in accordance with time, cost and quality specifications, and customer requirements 2.6 Apply quality procedures to address product/service and customer requirements
3. Monitor business performance	3.1 Regularly monitor/review the achievement of operational targets to ensure optimum business performance, in accordance

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	with the business plan goals and objectives 3.2 Review systems and structures, with a view to more effectively supporting business performance 3.3 Investigate and analyse operating problems to establish causes and implement changes as required as part of the business quality system 3.4 Amend operational policies and procedures to incorporate corrective action
4. Review business operations	4.1 Review and adjust business plan, as required, to maintain business viability, in accordance with business goals and objectives 4.2 Clearly record proposed changes to aid future planning and evaluation 4.3 Undertake ongoing research into new business opportunities and adjust business goals and objectives as new business opportunities arise

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to develop criteria and targets for the business plan
- communication skills to question, clarify and report
- literacy skills to interpret legal requirements, company policies and procedures
- numeracy skills to manage performance information and to control the finances
- technology skills to use relevant business equipment.

Required knowledge

- methods for developing and maintaining networks
- methods for implementing operation and revenue control systems
- methods for monitoring performance and implementing improvements
- OHS responsibilities and procedures for managing hazards
- principles of risk management relevant to the business, including risk assessment
- quality system principles and methods
- relevant industry codes of practice
- relevant marketing, sales and financial concepts
- relevant performance measures

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- role of innovation
- systems to manage staff, stock, expenditure, services and customer service
- environmentally sustainable business practice and operation
- technical or specialist skills relevant to the business operation.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • developing strategies and procedures to successfully manage the operation of the business • making appropriate adjustments to the business operations as required • knowledge of quality system principles and methods.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of running a small business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • portfolio of evidence including operational strategies and procedures • oral or written questioning to assess knowledge of principles of risk management relevant to the business, including risk assessment • review of analysis of operating problems (establishing causes and implementing changes as required as part of the business quality system) • review of records proposing changes to the business operations.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB406A Manage small business finances

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	• BSBSMB407A Manage a small team.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Operational strategies and procedures may be determined by:	• business premises (size, location, layout) • financial control systems and procedures • management and administrative systems and procedures • methods/techniques/technology • physical and natural resources • plant and equipment , including OHS requirements • premises, plant and equipment, which may be new or previously owned • purchase (sole or shared ownership) or leasing • raw materials • requirements, which may be one-off requirements or recurrent requirements (such as equipment maintenance) specific to the nature of the business • technology • environmentally sustainable principles of business operation • use of existing, new and emerging technologies including e-commerce.
Business goals and objectives may include:	• customer needs/marketing projections • family or community benefits • financial projections • goals, objectives, plans, systems and processes • lifestyle issues • proposed size and scale of the business, market focus of the business • short-, medium- or long-term goals • social responsibility.
Occupational health and safety and environmental issues must include:	• controls, which may include instructions to workplace personnel concerning site hazards and controls, material safety data sheets, use of personal protective equipment,

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	vehicle access, signs and barricades, traffic control, outside contractors • establishment and maintenance of procedures for assessing and controlling risks • establishment and maintenance of procedures for identifying risks to health and safety • environmentally sustainable purchase and supply of goods and services • waste and by-products.
Quality system may include:	• manual or computer quality control systems • quality assurance/management approaches • random inspections and assessments of goods and services against predetermined standards • random inspections and assessments of processes against predetermined standards • random sampling and follow-up of customers.
Operational targets may include:	• external targets, which may relate to market share and positioning and may involve exploring new markets, building national or international trade links • internal targets, which may relate to size, quality, quantity and diversity, wages to sales, sales to area/stock levels/stock turnover/average debtor payment periods and levels • staffing level and skills mix • targets, which may be short-, medium- or long-term.
Technical standards may include:	• current and generally agreed descriptions of what the product/service is, how it should be produced/delivered and the environmental sustainability, quality, safety, efficiency or other measures to determine the activity is done effectively.

Unit Sector(s)

Management and Leadership – Small and Micro Business

Custom Content Section

Not applicable.

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BSBSMB406A Manage small business finances

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to implement, monitor and review strategies for the ongoing management of a small business's finances. It also includes day to day financial management of the small business. Specific legal requirements apply to the management of a small business.

Application of the Unit

Application of the unit	This work is undertaken by individuals who operate a small business. The unit is suitable for existing micro and small businesses or a department in a larger organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Implement financial plan	1.1. Identify ***financial information*** requirements and obtain ***specialist services***, as required, to profitably operate and extend the business in accordance with the business plan 1.2. Produce financial budgets/projections, including ***cash flow*** estimates, as required for each forward period, and distribute to ***relevant people*** in accordance with legal requirements 1.3. Negotiate, secure and manage business capital to best enable implementation of the business plan and to meet the requirements of ***financial backers*** 1.4. Develop and maintain strategies to enable adequate financial provision for taxation in accordance with legal requirements 1.5. Develop, monitor and maintain client ***credit policies***, including contingencies for debtors in default, to maximise cash flow 1.6. Select key performance indicators to enable ongoing monitoring of financial performance 1.7. Record and communicate financial procedures to relevant people to facilitate implementation of the business plan
2. Monitor financial performance	2.1. Regularly monitor and report on financial performance targets and analyse data to establish the

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ELEMENT	PERFORMANCE CRITERIA
	extent to which the ***financial plan*** has been met 2.2. Monitor marketing and operational strategies for their effects on the financial plan 2.3. Calculate and evaluate ***financial ratios*** according to own/industry benchmarks 2.4. Assess financial plan to determine whether variations or alternative plans are needed, and change as required

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to interpret financial data • communication skills to negotiate capital and to report on performance • literacy skills to interpret legal requirements and financial reports • numeracy skills to calculate costs, prices, profit and other financial information.
Required knowledge
The following knowledge must be assessed as part of this unit: • benchmarking • financial decision making relevant to the business • financial indicators • purpose of financial reports • preparation and interpretation of budget/actual reports • principles for preparation of balance sheets and their interpretation • principles for preparation of profit and loss statements and their interpretation • stock records/stock control relevant to the business.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • development, implementation and review of strategies for the ongoing management of finance • maintenance of day-to-day financial management of the business as well as implementation of broad financial strategies • knowledge of purpose of financial reports.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of establishing or running a small business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • portfolio of evidence including financial reports • preparation and review of financial ratios • review of cash flow projections • analysis of development, monitoring and maintenance of client credit policies • oral or written questioning to assess knowledge of principles for preparation of balance sheets and their interpretation.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB402A Plan small business finances • BSBSMB405A Monitor and manage small business operations.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different

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RANGE STATEMENT	
work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Financial plan may include:	• analysis of sales by product/service, identifying where they were sold and to whom • cash flow estimates for each forward period • current financial state of the enterprise (or owner/operator) • estimates of profit and loss projections for each forward period • financial performance to date (if applicable) • likely return on investment • monthly, quarterly or annual returns • non-recurrent assets calculations • profit, turnover, capital and equity targets • projected profit targets, pricing strategies, margins • projections of likely financial results (budgeting) • projections, which may vary depending on the importance of such information and the stage in the life of the business • resources required to implement the proposed marketing and production strategies (staff, materials, plant and equipment) • review of financial inputs required (sources and forms of finance) • risks and measures to manage or minimise risks • working, fixed, debt and equity capital • working in conjunction with external consultants e.g. investment analysts, accountants, financiers

Financial information may include:	• accrual of staff leave/entitlements
	• asset management strategies which may include:
	  • owning, leasing, sharing, syndicating
	  • maintaining and deploying assets
	• asset registers
	• balance sheets
	• bookkeeping/accounting/stock/job costing records
	• business activity statements
	• business capital
	• cash book

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RANGE STATEMENT	
	• cash flow forecasts • financial budgets • financial indicators, which may be short-, medium- and/or long-term • payroll records, superannuation entitlements • profit and loss statements • ratios for profitability, liquidity/efficiency/financial structure • risk management • statements/forecasts • taxation returns including goods and services tax
Specialist services may include:	• accountants • business brokers/business consultants • government agencies • industry/trade associations • lawyers and providers of legal advice • mentors • online gateways • providers of training in accounting software
Cash flow may include:	• anticipated payments • anticipated receipts • customer credit policy/debt recovery • taxation provisions
Relevant people may include:	• family members • financial backers • franchise agency • owner/operator • partners • regulatory bodies • trade or industry associations
Financial backers may include:	• financiers/banks/lending institutions • leasing and hire purchase financiers • providers of venture capital • shareholders/partners/owners/family/friends
Credit policies may include:	• collateral • credit limits • credit references • debt collection • payment options • proof of Indigenous identity

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RANGE STATEMENT	
	• trading terms
Financial ratios may include:	• current ratio • days debtors outstanding • days stock on hand • expense percentages • gross profit percentage • liquid ratio • net profit percentage • proprietary/debt ratio • return on investment/return on total assets • staff productivity measures • stock turn rates

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB407A Manage a small team

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan for the management of and to manage staff. It involves industrial relations, staff selection, staff records, induction, training, team development and career planning to enhance business operations through retaining a competent, committed and motivated team in the workplace. Specific legal requirements apply to the management of a small business.

Application of the Unit

Application of the unit	This work is undertaken by individuals who operate a small business. The unit is suitable for existing micro and small businesses or a department in a larger organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop staffing plan	1.1. Determine ***staffing requirements*** to allow the business to run effectively, in accordance with the business requirements as outlined in the business plan 1.2. Identify and compare the existing skills/competencies of owner/s and staff with business requirements to identify any gaps 1.3. Develop ***policies and procedures*** for owner/s and staff, in accordance with the business plan
2. Recruit, induct, train and retain the team	2.1. Develop job/position descriptions, competencies required and selection criteria to meet the needs of the business 2.2. Judge information obtained from each candidate against specified selection criteria and decide selection in accordance with business needs and legal requirements 2.3. Induct new staff members in accordance with the policies and procedures of the business 2.4. Make team members aware of their responsibilities and performance requirements as soon as practicable and take opportunities to coach team members who

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ELEMENT	PERFORMANCE CRITERIA
	are unfamiliar with the procedures of the business 2.5. Develop and implement a ***staff development program and career paths*** based on the requirements of business and staff competencies 2.6. ***Advertise staff vacancies*** appropriately in accordance with staffing plan
3. Comply with INDUSTRIAL RELATIONS obligations	3.1. Clarify workplace rights and obligations of employers and employees, in accordance with ***legal requirements and codes of practice*** 3.2. Counsel staff, if required, in a positive and constructive manner and record outcomes accurately
4. Maintain staff records	4.1. Develop ***staff records system*** to provide timely and accurate information, in accordance with confidentiality, legal and taxation requirements 4.2. Monitor and accurately maintain the system for recording and retrieving personnel and payroll information and seek specialist advice where required
5. Manage staff	5.1. Regularly review contribution and skills of self and other team members to ensure performance is in line with agreed ***performance measures*** 5.2. Monitor and adjust staffing requirements to respond to any changes in tasks and functions required by the business 5.3. Support and encourage staff, and acknowledge and reward their contribution to the business 5.4. Regularly provide opportunities for staff to discuss work related issues 5.5. Develop ***contingency plans*** to cope with unexpected or extreme situations and take appropriate corrective action as required
6. Review team performance	6.1. Develop positive and constructive relationships with and between ***team members*** 6.2. Review and update team objectives in support of business goals on a regular basis in consultation with team members 6.3. Identify strengths and weaknesses of team against current and expected work requirements 6.4. Schedule time, on a regular basis, for team members to review work operations in order to maintain and improve operational efficiency 6.5. Encourage team members to monitor their own

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ELEMENT	PERFORMANCE CRITERIA
	performance, suggest improvements and to identify professional development needs, in accordance with personal and business requirements 6.6. Monitor and review staff turnover rate

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to identify workplace skill gaps • coaching skills • communication skills to relate to staff • conflict resolution skills • literacy skills to interpret legal requirements, to compile reports and to prepare a job/position description • team building and motivation skills.
Required knowledge
• commonwealth, state/territory and local government legislative requirements relating to business operation, especially in regard to occupational health and safety (OHS) and environmental issues, equal employment opportunity (EEO), industrial relations and anti-discrimination • OHS responsibilities and procedures for managing hazards • relevant industry awards/enterprise agreements • staff development and career planning • staff counselling, grievance and disciplinary procedures • unfair dismissal legislation and procedures.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • managing a small team including staff selection, staff records, induction, training and development • developing and maintaining team performance to enhance business operations • knowledge of relevant legislative requirements affecting business operation.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of running a small business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • portfolio of evidence including staff policies and records, and contingency plans • oral or written questioning to assess knowledge of staff recruitment procedures, staff development and review programs • review of job/position descriptions and selection criteria developed • review of documentation monitoring and reviewing staff turnover rate.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB405A Monitor and manage small business operations.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating

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RANGE STATEMENT	
conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Staffing requirements may include:	• full-time, part-time, permanent, temporary or casual • number of staff • responsibilities, competencies required • self, other owners, family and/or friends • sub-contractors or external advisors/consultants • time commitment, performance expectations
Policies and procedures must include:	• complaint and grievance procedures • culturally appropriate entitlements e.g. funeral leave, national/religious days • culturally appropriate procedures e.g. how business will enact cultural requirements for relationships between owner/operator, employees and service providers • employment conditions, equal opportunity, anti-discrimination, cultural diversity • induction and training • OHS • recruitment and selection • performance measures • professional development
Staff development program and career paths may include	• attendance at courses • career planning • coaching • flexible learning • job rotation • mentoring • on-the-job training • professional development • staff exchanges • succession planning
Advertising staff vacancies may include:	• electronic (radio, television and internet) • noticeboards • print media • word-of-mouth
Industrial relations may include:	• awards and/or industrial agreements and

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RANGE STATEMENT	
	relevant industrial instruments • counselling, dismissal procedures
Legal requirements and codes of practice may include:	• award and enterprise agreements and relevant industrial instruments • commonwealth, state/territory and local government legislative requirements affecting business operation, especially in regard to OHS and environmental issues, EEO, industrial relations and anti-discrimination • relevant industry codes of practice
Staff records system must include:	• disciplinary and grievance procedures • employee records (including tax file number, remuneration, leave and training records) • job/position descriptions • OHS record • records of taxation and superannuation payments made
Performance measures may include:	• overall staff productivity • percentage of chargeable hours/days per week • performance of key people • ratio of direct workers to those who support, supervise or manage them • ratio of sales dollars per employee • staff morale, work ethic, work satisfaction
Contingency plans may include:	• accidents or emergencies • environmental issues • fluctuating workloads • OHS • unpredicted customer demand/busy periods • unpredicted staff shortages
Team members may include:	• employees, trainees/apprentices, sub-contractors or external advisers/consultants • owner/s, partners, family members

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB408B Manage personal, family, cultural and business obligations

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to examine the impact that personal, family and cultural obligations have on business operations, and to develop and implement strategies to improve business success. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This work is undertaken by individuals who operate a small business.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify personal and business commitments/obligations within family, cultural and community contexts	1.1. Identify the personal, family, cultural and/or community ***contexts*** in which the business operates 1.2. Identify the personal, family, cultural and/or community ***commitments***/***obligations*** that impact on the business 1.3. Consider ***strategies*** to address and minimise the negative impact these commitments/obligations may have on the business 1.4. Prepare workable ***plans*** to address and minimise the impact of these issues
2. Develop ethical work practices within family, cultural and community contexts	2.1. Develop a ***culturally appropriate work ethic*** in terms of personal, family and community obligations, and cultural requirements 2.2. Identify and implement strategies to reinforce a culturally appropriate work ethic in the business 2.3. Prepare contingency plans for when alternative action is required due to changes within the business, family, cultural and/or community environments
3. Review work practices within family, cultural and community contexts	3.1. Monitor personal, family, cultural and/or community commitments/obligations to identify any changes that might impact on the business 3.2. ***Review*** plans and strategies to ensure that negative impacts of any commitments/obligations are being

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ELEMENT	PERFORMANCE CRITERIA
	addressed and implement any necessary changes 3.3. Monitor implementation of the culturally appropriate work ethic to ensure that it is supported and maintained in the business

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to identify own obligations
- communication skills to clarify needs and to articulate business ideas to a range of family/community members
- interpersonal skills to negotiate/mediate with sensitivity towards family and/or cross-cultural issues.

Required knowledge

- characteristics of small business and its environment
- community and family expectations and dynamics
- cultural and family relationships
- historical/cultural/ceremonial/religious/family issues that are relevant to specific communities
- life/work balances particularly relating to health
- local community and relevant organisations and persons within the community
- relevant legislation, codes and national standards from all levels of government which may effect business operation, such as:
  - award and enterprise agreements and relevant industrial instruments
  - anti-discrimination
  - equal opportunity
  - OHS
  - relevant industry codes of practice.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • completeness in terms of scope and detail of analysis of the implications of family, cultural and community obligations/commitments on self, staff and the business • clarification of a culturally appropriate work ethic and the workability of plans and strategies for maintaining this ethic • plans and strategies to address the negative impact obligations/commitments may have on the business • knowledge of characteristics of small business and its environment.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of running a small business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • portfolio of evidence including the analysis of the implications of obligations/commitments and plans/strategies to address any negative impacts these may have on the business • oral or written questioning to assess knowledge of community and family expectations and dynamics • analysis of review of plans and strategies.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBSMB409A Build and maintain relationships with small business stakeholders.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Contexts in which the business operates may include relationships within:	• business community • culturally and linguistically diverse communities • family groups • Indigenous communities • non-Indigenous communities • professional community • religious and/or spiritual communities • specific target groups
Commitments*/*obligations may relate to:	• community • family • self • staff
Commitments*/*obligations may include:	• business commitments and community/family responsibilities • personal principles • personal work/life balances and priorities e.g. health considerations such as exercise, stress • professional commitments • resource commitments to community e.g. contributions to social goals, Community Development Employment Program (CEDP) staff responsibilities, community centres, mentoring, community projects • resource commitments to cultural life e.g. cultural maintenance programs, language maintenance • resource commitments to immediate and extended family members e.g. money obligations, skills and resource contributions to family projects • time commitments to community activities e.g. participation in community events, ceremonies and activities, school committees,

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RANGE STATEMENT	
	sporting associations • time commitments to immediate and extended family members e.g. child care and aged care responsibilities, emotional support obligations for family issues • time commitments to cultural life e.g. National Aboriginal and Torres Strait Islander Day of Celebration (NAIDOC) activities, National Sorry Day activities, National Reconciliation Week activities, religious activities, national days, ceremonies, funerals and related mourning business

Strategies may include:	• communication strategies
	• consulting with other small businesses to identify successful strategies used
	• developing clear guidelines for staff, such as:
	  • codes of conduct
	  • customer/client charters
	  • family/community charters
	  • job descriptions
	  • organisational trees
	• developing clear processes for staff
	• developing plans to address unanticipated events
	• developing plans to include health considerations for self and staff
	• personal vision/values
	• using diaries/calendars to timetable known obligations

Plans may relate to:	• communication • contingency • OHS • performance appraisal • personal and staff development • succession arrangements • time management
Culturally appropriate work ethic may include:	• impact on and within the community • impact on and within the family • impact on and within the wider community • impact on self

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RANGE STATEMENT	
	• relevance of the business to the community • relevance of work to the individual • role development and clarification processes • skills to perform the work
Reviewing plans and strategies may include:	• 360Âº feedback • applying qualitative and/or quantitative measures to business performance • applying qualitative and/or quantitative measures to individual performance • family or community consultation

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSMB409A Build and maintain relationships with small business stakeholders

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to establish and develop relationships with small business key stakeholders, and roles and responsibilities in the small business. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This work is undertaken by individuals who operate a small business.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish and develop communication and appropriate relationships with key stakeholders	1.1. Establish ***specific practices for communication*** with ***key stakeholders***, in accordance with codes of practice, cultural protocols and agreed roles and responsibilities 1.2. Maintain specific ways of dealing with ***issues in communication*** with key stakeholders that adhere to codes of practice, cultural protocols and agreed roles and responsibilities 1.3. Identify and implement methods of working in culturally appropriate ways 1.4. Identify and implement plans to deal with changes in circumstances and behaviours, as required
2. Establish and develop roles and responsibilities in the small business	2.1. Clearly and accurately clarify ***roles and responsibilities in the business*** in accordance with ***organisational structure and lines of authority***, ***codes of practice*** and ***job documentation*** 2.2. Identify and apply specific practices and behaviours from the codes of practice, that contribute to successful working relationships 2.3. Clearly communicate responsibilities and practices to key stakeholders
3. Review relationships with key stakeholders	3.1. Review communication practices used with key stakeholders and implement any necessary improvement strategies

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ELEMENT	PERFORMANCE CRITERIA
	3.2. Monitor and evaluate relationships with key stakeholders and develop action plan/s needed to enhance relationships 3.3. Evaluate roles and responsibilities in the business and undertake any revisions necessary to improve successful working relationships

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to assess situations for the core issues • communication skills to consult with various stakeholders, adjusting one's language to meet the language of stakeholders; to negotiate constructively to achieve outcomes; to work cooperatively with a diverse range of people with different needs • literacy skills to locate relevant information, and to develop job outlines and codes of practice for the business • problem-solving skills to deal with stakeholder issues.
Required knowledge
• business ethics • codes of practice for the business • organisational structures and their legal implications.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate	Evidence of the following is essential:

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EVIDENCE GUIDE	
competency in this unit	• ways of working and communicating with key stakeholders based on the roles and responsibilities, codes of practice and cultural protocols for the business • development and communication of roles, responsibilities, duties and tasks of small business personnel to key stakeholders • process for reviewing relationships with key stakeholders • knowledge of organisational structures and their legal implications.
Context of and specific resources for assessment	Assessment must ensure: • access to relevant documentation • candidate's individual circumstances and work in the context of running a small business, are the basis for assessment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • portfolio of evidence including review of communication and relationships with key stakeholders • oral or written questioning to assess knowledge of business ethics • review of how methods of working in culturally appropriate ways were implemented.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBREL401A Establish networks • BSBSMB408A Manage personal, family, cultural and business obligations.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised

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RANGE STATEMENT	
wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Specific practices for communication with key stakeholders may include:	• contingency plans for changes • informal face-to-face/telephone networking • regular formal meetings • use of formats suited to people with specific support needs, where appropriate, such as large print, interpreters, telephone typewriter (TTY), material in community language/s, Auslan (Australian Sign Language) • written processes
Key stakeholders may include:	• business partners • community members, Elders, traditional owners • community organisations • customers • family members • franchise owner • funding agencies and financial institutions • government agencies • shareholders • staff • suppliers
Issues in communication may include:	• communication protocols for Indigenous, non-Indigenous, and culturally and linguistically diverse peoples • cross-cultural misunderstandings • dealing with difficult clients • expectations of Indigenous and culturally and linguistically diverse peoples • family obligations of Indigenous, and culturally and linguistically diverse peoples • negotiating with stakeholders • processing complaints • respect for others
Roles and responsibilities in the business may include:	• differences between roles and duties • role overlap conflicts with other staff and self, with other key stakeholders e.g. management committee members, contractors, accountants

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RANGE STATEMENT	
	etc. and self and staff • scope of responsibilities within the job • types of duties to be performed
Organisational structure and lines of authority may include:	• cooperative/incorporated association structures • corporate structure and corporate governance • government owned enterprise • location of business within the community • nature of reporting • partnerships • power structures and relationships • reporting processes • sole traders
Codes of practice for the business may include:	• business operations standards • cultural considerations and principles for operating • ethical considerations and principles for operating • guidelines for operations • legal considerations and principles for operating • policies • quality assurance practices and principles
Job documentation may include:	• background to the business • competencies required for positions • details of responsibilities • details of specific duties or tasks to be carried out • duty statement • level of wage or salary • job/position description • outline of the job to be performed • reporting relationship • selection criteria • special provisions

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Small and Micro Business

Co-requisite units

Co-requisite units		

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BSBSUS201A Participate in environmentally sustainable work practices

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively measure current resource use and to carry out improvements including reducing the negative environmental impact of work practices. This unit requires the ability to access industry information, and applicable legislative and occupational health and safety (OHS) guidelines. While no licensing, legislative, regulatory or certification requirements apply holistically to this unit at the time of publication, relevant national, state and territory legislation, regulations and codes of practice impact upon this unit.

Application of the Unit

Application of the unit	This unit applies to operators/team members under supervision or guidance, who are required to follow workplace procedures and instructions, and to work in an environmentally sustainable manner. It covers: efficient resource use potential environmental hazards regulatory compliance improving environmental performance (within the scope of competency, authority and own level of responsibility). It addresses the knowledge, processes and techniques necessary to participate in environmentally sustainable work practices.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify current resource use	1.1. Identify workplace ***environmental and resource efficiency issues*** 1.2. Identify resources used in own work role 1.3. Document and measure current usage of resources using ***appropriate techniques*** 1.4. Record and file documentation measuring current usage, using technology (such as software systems) where applicable 1.5. Identify and report workplace environmental

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ELEMENT	PERFORMANCE CRITERIA
	hazards to appropriate personnel
2. Comply with environmental regulations	2.1. Follow workplace procedures to ensure ***compliance*** 2.2. Report breaches or potential breaches to appropriate personnel
3. Seek opportunities to improve resource efficiency	3.1. Follow ***organisational plans*** to improve environmental practices and resource efficiency 3.2. Work as part of a team, where relevant, to identify possible areas for improvements to work practices in own work area 3.3. Make ***suggestions*** for improvements to workplace practices in own work area

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to comply with all relevant legislation associated with job specifications and procedures
- communication and problem-solving skills to question, seek clarification and make suggestions relating to work requirements and efficiency
- communication and teamwork skills to recognise procedures; to follow instructions; to respond to change, such as current workplace environmental/sustainability frameworks; and to support team work and participation in a sustainable organisation
- literacy, numeracy and technology skills to interpret workplace information in relation to work role, and to document and measure resource use
- technology skills to select and use technology appropriate for a task.

Required knowledge

- environmental and resource hazards/risks
- environmental or sustainability legislation, regulations and codes of practice applicable to own work role
- OHS issues and requirements
- organisational structure, and reporting channels and procedures
- relevant environmental and resource efficiency systems and procedures
- sustainability in the workplace
- terms and conditions of employment including policies and procedures, such as

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REQUIRED SKILLS AND KNOWLEDGE
daily tasks, employee and employer rights, equal opportunity.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • accessing, interpreting and complying with a range of environment/sustainability legislation and procedural requirements relevant to daily responsibilities • accurately following organisational information to participate in and support an improved resource efficiency process and reporting as required • developing and/or using tools such as inspection checklists, to collect and measure relevant information on organisation resource consumption, within work role • identifying organisational improvements by applying efficient resource use to daily activities • knowledge of environmental and resource hazards/risks.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • evidence is relevant to the particular workplace role, including work area, equipment, systems, and documentation • review of current work area directly relating to own work, to assess measurement of resources used, hazards and compliance • individual or team discussion about potential for increased resource efficiency within current work area • access to workplace documents, information and resources (such as compliance obligations, enterprise

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EVIDENCE GUIDE	
	plans, work responsibilities).
Method of assessment	A range of assessment methods should be used t assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques over time and in a range of situations • analysis of responses to case studies and scenarios • review of documentation measuring current resource usage • evaluation of techniques used to document and measure current usage of resources • review of identified and reported workplace environmental hazards • evidence of active participation in organisational plans to improve environmental practices and resource efficiency.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBINN201A Contribute to workplace innovation • BSBSMB301A Investigate micro business opportunities • BSBWOR202A Organise and complete daily work activities.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Environmental and resource	• maximising opportunities to improve business environmental performance

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RANGE STATEMENT	
efficiency issues may include:	• minimising environmental risks • promoting more efficient production and consumption of natural resources, for example minimising waste by participating in or using a waste management system • using resources efficiently such as material usage, energy usage (seeking alternative sources of energy or energy conservation) or efficient water usage
Appropriate techniques may include:	• examining and documenting resources in work area • examining invoices from suppliers • examining relevant information and data • measuring resource usage under different conditions • reports from other parties involved in the process of identifying and implementing improvements

Compliance may include:	• meeting relevant laws, by-laws and regulations or best practice to support compliance in environmental performance and sustainability at each level as required (such as Environmental Protection or Biodiversity Conservation Act):
	  • international
	  • commonwealth
	  • state/territory
	  • local government
	  • industry
	  • organisation

Organisational plans may include:	• documented policies and procedures • work plans to minimise waste or to increase efficiency of resources such as a green office program, supply chain program for purchasing sustainable products or an environmental management framework
Suggestions may include ideas that help to:	• improve energy efficiency • increase use of renewable, recyclable, reusable and recoverable resources • maximise opportunities such as use of solar power or other alternative forms of energy, where appropriate

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RANGE STATEMENT	
	• prevent and minimise risks • reduce emissions of greenhouse gases • reduce use of non-renewable resources

Unit Sector(s)

Unit sector	

Competency field

Competency field	Industry Capability - Sustainability

Co-requisite units

Co-requisite units		

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BSBSUS301A Implement and monitor environmentally sustainable work practices

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively analyse the workplace in relation to environmentally sustainable work practices and to implement improvements and monitor their effectiveness. This unit requires the ability to access industry information, applicable legislative and occupational health and safety (OHS) guidelines. While no licensing, legislative, regulatory or certification requirements apply holistically to this unit at the time of publication, relevant national, state and territory legislation, regulations and codes of practice impact upon this unit.

Application of the Unit

Application of the unit	This unit applies to those with responsibility for a specific area of work or who lead a work group or team. It addresses the knowledge, processes and techniques necessary to implement and monitor environmentally sustainable work practices, including the development of processes and tools, such as: • identifying areas for improvement • developing plans to make improvements • implementing and monitoring improvements in environmental performance. A person who demonstrates competence in this unit must be able to provide evidence of the ability to implement and monitor integrated environmental and resource efficiency management policies and procedures within an organisation. Evidence must be strictly relevant to the

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	particular workplace role.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Investigate current practices in relation to resource usage	1.1. Identify environmental regulations applying to the enterprise 1.2. Analyse procedures for assessing ***compliance*** with environmental/sustainability regulations 1.3. Collect information on environmental and resource

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ELEMENT	PERFORMANCE CRITERIA
	efficiency systems and procedures, and provide to the work group where appropriate 1.4. Collect, analyse and organise information from a range of ***sources*** to provide information/advice and tools/resources for improvement opportunities 1.5. Measure and document current resource usage of members of the work group 1.6. Analyse and document current ***purchasing strategies*** 1.7. Analyse current work processes to access information and data to assist in identifying areas for improvement
2. Set targets for improvements	2.1. Seek input from ***stakeholders***, ***key personnel and specialists*** 2.2. Access external sources of information and data as required 2.3. Evaluate alternative solutions to workplace environmental issues 2.4. Set efficiency targets
3. Implement performance improvement strategies	3.1. Source and use appropriate ***techniques and tools*** to assist in achieving efficiency targets 3.2. Apply continuous improvement strategies to own work area of responsibility, including ideas and possible solutions to communicate to the work group and management 3.3. Implement and integrate ***environmental and resource efficiency improvement plans*** for own work group with other operational activities 3.4. Supervise and support team members to identify possible areas for improved practices and resource efficiency in work area 3.5. Seek ***suggestions*** and ideas about environmental and resource efficiency management from stakeholders and act upon where appropriate 3.6. Implement costing strategies to fully value environmental assets
4. Monitor performance	4.1. Use and/or develop evaluation and monitoring, tools and technology 4.2. Document and communicate outcomes to report on efficiency targets to key personnel and stakeholders 4.3. Evaluate strategies and improvement plans

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ELEMENT	PERFORMANCE CRITERIA
	4.4. Set new efficiency targets, and investigate and apply new tools and strategies 4.5. Promote successful strategies and reward participants where possible

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical skills to analyse problems, to devise solutions and to reflect on approaches taken • change management skills • communication skills to answer questions, clarify and acknowledge suggestions relating to work requirements and efficiency • communication/consultation skills to support information flow from stakeholders to the work group • innovation skills to identify improvements, to apply knowledge about resource use to organisational activities and to develop tools • literacy skills to comprehend documentation, to interpret environmental and energy efficiency requirements, to create tools to measure and monitor improvements and to report outcomes • numeracy skills to analyse data on organisational resource consumption and waste product volumes • planning and organising skills to implement environmental and energy efficiency management polices and procedures relevant to own work area • problem-solving skills to devise approaches to improved environmental sustainability and to develop alternative approaches as required • technology skills to operate and shut down equipment; where relevant, to use software systems for recording and filing documentation to measure current usage; and to use word processing and other basic software for interpreting charts, flowcharts, graphs and other visual data and information • supervisory skills to work effectively with a team
Required knowledge
• best practice approaches relevant to own area of responsibility and industry • compliance requirements within work area for all relevant environmental/sustainability legislation, regulations and codes of practice including resource hazards/risks associated with work area, job specifications and procedures

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REQUIRED SKILLS AND KNOWLEDGE
• environmental and energy efficiency issues, systems and procedures specific to industry practice • external benchmarks and support for particular benchmarks to be used within organisation, including approaches to improving resource use for work area and expected outcomes • OHS issues and requirements • organisational structure and reporting channels and procedures • quality assurance systems relevant to own work area • strategies to maximise opportunities and to minimise impact relevant to own work area • supply chain procedures • terms and conditions of employment including policies and procedures, such as daily tasks, work area responsibilities, employee, supervisor and employer rights, equal opportunity

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • knowledge of relevant compliance requirements within work area • developing plans to make improvements • planning and organising work group activities in relation to measuring current use and devising strategies to improve usage • monitoring resource use and improvements for environmental performance relative to work area and supervision • ensuring appropriate action is taken within work area in relation to environmental/sustainability compliance and potential hazards • implementing new approaches to work area in an effort to resolve and improve environmental and resource efficiency issues and reporting as required.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to a range of environment/sustainability legislation, standards, guidelines and procedural requirements relevant to specific work area, daily responsibilities and supervision • access to a range of information, workplace documentation and resources such as compliance obligations, organisation plans, work supervision and responsibilities • access to reports from other parties involved in the process of identifying and implementing improvements • evidence is relevant to the particular workplace role, including work area, staff, stakeholders, equipment, systems and documentation.
Method of assessment	A range of assessment methods should be used t assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • response to case studies • review of reports of activities of work group in relation to measuring resource use and developing improvement strategies • review of work plans outlining approaches to improved practices with documented benchmarks • analysis of the way in which advice is sought and suggestions are made about improvements • observation over time and in a range of situations in relation to review of overall work area and staff, to assess and measure resource use, hazards and compliance • review of checklists to identify and assess resource usage at the beginning and end of the unit; reports on meetings around procedures and improvement processes and monitoring within the workplace; lists of environmental hazards/risks or inefficiencies or opportunities for improvements identified in the workplace • analysis of implementation of programs such as a

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EVIDENCE GUIDE	
	green office program, supply chain program for purchasing sustainable products, or an environmental management framework • oral or written questioning to assess knowledge of environmental and energy efficiency issues, systems and procedures specific to industry practice.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIC411C Communicate with the community • BSBINN301A Promote innovation in a team environment • BSBLED401A Develop teams and individuals • BSBMGT402A Implement operational plan • BSBMGT403A Implement continuous improvement • BSBRSK401A Identify risk and apply risk management processes.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Compliance may include:	• meeting relevant laws, by-laws and regulations or best practice or codes of practice to support compliance in environmental performance and sustainability at each level as required (such as Environmental Protection or Biodiversity Conservation Act): • international • commonwealth • state/territory • industry • organisation.

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RANGE STATEMENT	
Sources may include:	• organisation specifications • regulatory sources • relevant stakeholders • resource use.
Purchasing strategies may include:	• influencing suppliers to take up environmental sustainability approaches • researching and participating in programs such as a supply chain program to purchase sustainable products.

Stakeholders, ***key personnel and specialists*** may include:	• individuals and groups both inside and outside the organisation who have direct or indirect interest in the organisation's conduct, actions, products and services, including:
	  • customers
	  • employees at all levels of the organisation
	  • government
	  • investors
	  • local community
	  • other organisations
	  • suppliers
	• key personnel within the organisation, and specialists outside the organisation who may have particular technical expertise.

Techniques and tools may include:	• examination of invoices from suppliers • examination of relevant information and data • measurements made under different conditions • others as appropriate to the specific industry context.
Environmental and resource efficiency improvement plans may include:	• addressing environmental and resource sustainability initiatives such as environmental management systems, action plans, green office programs, surveys and audits • applying the waste management hierarchy in the workplace • determining organisation's most appropriate waste treatment including waste to landfill, recycling, re-use, recoverable resources and wastewater treatment • initiating and/or maintaining appropriate organisational procedures for operational energy consumption, including stationary

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RANGE STATEMENT	

	energy and non-stationary (transport)
	• preventing and minimising risks, and maximising opportunities such as:
	  • improving resource/energy efficiency
	  • reducing emissions of greenhouse gases
	• reducing use of non-renewable resources
	• referencing standards, guidelines and approaches such as:
	  • ecological footprinting
	  • Energy Efficiency Opportunities Bill 2005
	  • Global Reporting Initiative
	  • green office program - a cultural change program
	  • green purchasing
	  • Greenhouse Challenge Plus (Australian government initiative)
	  • ISO 14001:1996 Environmental management systems life cycle analyses
	  • product stewardship
	  • supply chain management
	  • sustainability covenants/compacts
	  • triple bottom line reporting.

Suggestions may include ideas that help to:	• prevent and minimise risks and maximise opportunities such as:
	  • usage of solar or renewable energies where appropriate
	  • reducing emissions of greenhouse gases
	  • reducing use of non-renewable resources
	  • making more efficient use of resources, energy and water
	• maximising opportunities to re-use, recycle and reclaim materials
	• identifying strategies to offset or mitigate environmental impacts:
	  • purchasing carbon credits
	  • energy conservation
	  • reducing chemical use
	  • reducing material consumption
	• expressing purchasing power through the selection of suppliers with improved

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RANGE STATEMENT	
	environmental performance e.g. purchasing renewable energy • eliminating the use of hazardous and toxic materials.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Industry Capability - Sustainability

Co-requisite units

Co-requisite units		

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BSBSUS501A Develop workplace policy and procedures for sustainability

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and implement a workplace sustainability policy, including the modification of the policy to suit changed circumstances. This unit requires the ability to access industry information, applicable legislative and occupational health and safety (OHS) guidelines. While no licensing, legislative, regulatory or certification requirements apply holistically to this unit at the time of publication, relevant national, state and territory legislation, regulations and codes of practice impact upon this unit.

Application of the Unit

Application of the unit	This unit addresses the knowledge, processes and techniques necessary to develop approaches to sustainability within workplaces, including the development and implementation of policy. This unit applies to people with managerial responsibility who undertake work developing approaches to create strategies within workplaces, including the development and implementation of policy and includes: • communicating with relevant stakeholders • developing and monitoring policies • reviewing and improving policies. A person who demonstrates competence in this unit must be able to provide evidence of the ability to develop and implement integrated sustainability policies and

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	procedures within an enterprise. The review of the policy after implementation will also need to be evidenced. The context of the unit applies to all sectors of the business industry; it may be applied to all sections of an organisation, including the office, the factory floor, or work area. With such a broad application, the unit will need to be contextualised as it is applied across an organisation and across different industry sectors.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

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Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop workplace sustainability policy	1.1. Define ***scope*** of sustainability policy 1.2. Gather information from a range of ***sources*** to plan and develop policy 1.3. Identify and consult ***stakeholders*** as a key component of the policy development process 1.4. Include appropriate ***strategies*** in policy at all stages of work for minimising resource use, reducing toxic material and hazardous chemical use, and employing life cycle management approaches 1.5. Make recommendations for policy options based on likely effectiveness, timeframes and cost 1.6. Develop policy that reflects the organisation's commitment to sustainability as an integral part of business planning and as a business opportunity 1.7. Agree to appropriate methods of implementation
2. Communicate workplace sustainability policy	2.1. Promote workplace sustainability policy, including its expected outcome to key stakeholders 2.2. Inform those involved in implementing the policy as to outcomes expected, activities to be undertaken and responsibilities assigned
3. Implement workplace sustainability policy	3.1. Develop and communicate procedures to help implement workplace sustainability policy 3.2. Implement strategies for continuous improvement in resource efficiency 3.3. Establish and assign responsibility to use recording systems for tracking continuous improvements in sustainability approaches
4. Review workplace sustainability policy implementation	4.1. Document outcomes and provide feedback to key personnel and stakeholders 4.2. Investigate successes or otherwise of policy 4.3. Monitor records to identify trends that may require remedial action and use to promote continuous improvement of performance 4.4. Modify policy and or procedures as required to ensure improvements are made

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to adjust communication to suit different audiences; to respond effectively to diversity; to work as a member of a team to consult on and validate policy • literacy skills to read and evaluate complex and formal documents such as policy and legislation • problem skills to effectively manage different points of view and dissenting stakeholders • research, analytical and writing skills to research, analyse and present information; to prepare written reports requiring precision of expression and language and structures suited to the intended audience
Required knowledge
• best practice approaches relevant to own work area • environmental or sustainability legislation, regulations and codes of practice applicable to industry and organisation • equal employment opportunity, equity and diversity principles and occupational health and safety implications of policy being developed • policy development processes and practices • principles, practices and available tools and techniques of sustainability management relevant to the particular industry context • quality assurance systems relevant to own organisation • relevant industry competency • relevant organisational polices, procedures and protocols • relevant systems and procedures to aid in the achievement of workplace sustainability

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • candidate's involvement as a key person in planning, developing and implementing organisational policy and that the developed policy complies with legislative requirements • implementation strategy, as part of the policy, that has been devised, implemented and reviewed showing a measurable improvement utilising the chosen benchmark indicators • communicating with stakeholders to discuss possible approaches to policy development and implementation, and contributing to the resolution of disputes among stakeholders • developing and monitoring policies for analysing data on enterprise resource consumption • using software systems for recording and filing documentation for measurement of current usage and using word processing and other basic software for interpreting charts, flowcharts, graphs and other visual data and information • reviewing and improving policies by identifying improvements and benchmarking against industry best practice and attempting new approaches continuously over time.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to relevant legislation/standards/guidelines • access to a range of workplace documentation and personnel, information and resources (such as compliance obligations, organisational plans, work responsibilities) • access to reports from other parties involved in the development and implementation of policy • evidence is collected over time, involving both formative and summative assessment • evidence is relevant to the particular workplace role, including work area, equipment, systems, and documentation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

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EVIDENCE GUIDE	
	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on the job performance by the candidate • response to case studies • review of policy developed and procedural documentation outlining the approach taken • review of implementation strategy, plans and work plans • analysis of methods used to involve stakeholders in policy development, implementation and review • analysis of inefficiencies or opportunities for improvements identified in the workplace • evaluation of participation in sustainability work practices and programs such as an environmental management framework • observation over time in relation to review of work area relating to policy and procedures being developed to assess measurement of resources used, hazards and compliance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBATSIM419A Contribute to the development and implementation of organisational policies • BSBHRM506A Manage recruitment, selection and induction processes • BSBHRM602B Manage human resources strategic planning • BSBINN502A Build and sustain an innovative work environment • BSBMGT515A Manage operational plan • BSBMGT516C Facilitate continuous improvement • BSBMGT608C Manage innovation and continuous improvement • BSBMGT616A Develop and implement strategic plans • BSBMGT617A Develop and implement a business plan • BSBRSK501A Manage risk.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Scope of workplace sustainability policy may include:	• addressing sustainability initiatives through reference to standards, guidelines and approaches such as:
	  • ecological foot printing
	  • Energy Efficiency Opportunities Bill 2005l
	  • Global Reporting Initiative
	  • green office program
	  • green purchasing
	  • Greenhouse Challenge Plus (Australian government initiative)
	  • ISO 14001:1996 Environmental management systems life cycle analyses
	  • life cycle analyses
	  • product stewardship
	  • supply chain management
	  • sustainability covenants/compacts
	  • triple bottom line reporting
	• integrated approach to sustainability which includes environmental, economic and social aspects, or a specific approach that focuses on each aspect individually
	• investigating particular business and market context of the industry/organisation
	• meeting relevant laws, by laws and regulations or best practice to support compliance in environmental performance and sustainability at each level as required (such as Environmental Protection or Biodiversity Conservation Act):
	  • international
	  • commonwealth
	  • state/territory
	  • industry

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RANGE STATEMENT	
	• organisation • parts of the organisation to which it is to apply, including whether it is for the whole organisation, one site, one work area or a combination of these.
Sources may include:	• regulatory sources • relevant personnel • organisational specifications.

Stakeholders may include:	• individuals and groups both inside and outside the organisation who have some direct interest in the organisation's conduct, actions, products and services, including:
	  • customers
	  • employees at all levels of the organisation
	  • government
	  • investors
	  • local community
	  • other organisations
	  • regulators
	  • suppliers
	• key personnel within the organisation and specialists outside the organisation who may have particular technical expertise.

Strategies may include:	• promotional activities • raising awareness among stakeholders • training staff in sustainability principles and techniques.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Industry Capability - Sustainability

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Co-requisite units

Co-requisite units		

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BSBWOR201A Manage personal stress in the workplace

Modification History

Release	Comments
Release 2	New release of this Qualification released with *version 6 of BSB07* Business *Services Training Package*. Outdated advice removed

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to manage personal stress in a customer contact environment.

Application of the Unit

This unit requires an awareness of sources of personal stress, the development of strategies to effectively manage stress, time management and recovery from stressful contacts or situations. This particularly applies in a contact centre environment due to the very measured, structured, high volume and potentially repetitive nature of the work but could apply in any work environment.

Competence in this unit requires resilience and self management of the stress that can be encountered in a customer contact environment.

This work is undertaken with some guidance and supervision.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable

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Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop personal awareness of stress	1.1. Recognise ***signs and sources of stress*** 1.2. Acknowledge stress and ***difficult situations*** 1.3. Analyse and understand potential areas of stress in the work environment
2. Develop stress management techniques	2.1. Develop an effective understanding of a range of ***stress management techniques*** 2.2. Use appropriate techniques effectively to manage stressful situations 2.3. Focus on areas of stress within personal control 2.4. Adopt strategies to effectively reduce, manage and deal with stress
3. Manage time	3.1. Develop and understand job role priorities 3.2. Develop techniques to support the achievement of ***key performance indicators*** (***KPIs***) and priorities 3.3. Use appropriate ***time management tools and techniques*** 3.4. Regularly evaluate tools and techniques 3.5. Promptly identify and inform relevant personnel of any variations and difficulties affecting work requirements, through regular reviews
4. Recover from a stressful contact	4.1. Review the contact or situation 4.2. Analyse the root cause/s of stressful contact or situation 4.3. Depersonalise the context of contact or situation

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ELEMENT	PERFORMANCE CRITERIA
	4.4. Discuss outcomes with appropriate staff members 4.5. Prepare for next contact or situation in a positive manner 4.6. Follow-up or take action where needed
5. Maintain personal stamina and resilience	5.1. Identify ***sources of fatigue*** in contact centre role 5.2. Adopt work routine and procedural strategies to minimise stress and fatigue 5.3. Monitor personal performance against performance requirements 5.4. Adapt ***stamina management strategies*** to maximise performance 5.5. Seek assistance from team members and management in managing stamina
6. Maintain work/life balance	6.1. Identify work/life priorities 6.2. Adopt strategies to support work/life priorities 6.3. Give high priority to health and wellbeing 6.4. Monitor work/life balance 6.5. Develop the ability to effectively leave work behind at the end of the day

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to understand the needs of internal and external customers
- communication skills to relate to people from diverse backgrounds and people with diverse abilities
- customer service skills to handle customer contacts confidently and effectively
- interpersonal skills to establish rapport and to build relationships with customers, team members and stakeholders
- literacy skills to communicate and articulate clearly and effectively
- negotiation skills to effectively deal with customers and work colleagues
- organisational skills to manage own tasks within timeframes
- problem-solving skills to solve problems creatively, independently and confidently
- self-confidence skills to confidently introduce own ideas and abilities
- self management skills to evaluate and monitor own performance and wellbeing
- teamwork skills to participate positively within the team and to be supported by the team.

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Required knowledge

- escalation pathways
- job role priorities and KPIs
- internal and external sources of assistance
- occupational health and safety guidelines and policies
- signs and sources of existing and potential stress or difficult situations
- stress management and reduction techniques
- time management tools and techniques
- workplace policies and procedures.

Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • understanding of signs and sources of stress • understanding of job role priorities and KPIs • knowledge of occupational health and safety guidelines and policies.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace information and data • access to KPI and performance management documentation • access to relevant legislation, standards and guidelines.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral and/or written questioning to assess knowledge of signs and sources of stress • direct observation of the candidate effectively managing time and work priorities • oral and/or written questioning to assess knowledge

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	of time management tools and techniques • oral and /or written questioning to assess knowledge of process to work through and recover from a stressful situation • oral and/or written questioning to assess knowledge of signs of work/life balance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Signs of stress may include:	• absence from work • conflict • fatigue • lack of self-esteem and confidence • poor work performance • sickness
Sources of stress may include:	• challenging KPIs and/or priorities • complex tasks • difficult customer contact • external factors • inadequate physical environment • interpersonal relationships
Difficult situations may include:	• changing regulations and legislation • customer abuse • customer complaint • high number of customer contacts • sensitive customer situations • unreliable technology
Stress management techniques may include:	• debriefing with peers and/or line manager • relaxation methods • specific training • stretching and exercises • taking breaks

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KPIs may include:	• call rates • compliance with schedules (adherence) • customer satisfaction results • performance measures • quality assurance ratings • sales targets • targets
Time management tools and techniques may include:	• diary and/or schedule • organising information • prioritisation of tasks • self-management of training requirements
Sources of fatigue may include:	• ergonomic factors • excessive overtime • external issues • overload of information • repetitive tasks and/or contacts • shift rostering and hours of work

Stamina management strategies may include:	• management of personal wellbeing, for example:
	  • breaks
	  • hydration
	  • life balance
	  • meals
	  • recognising fatigue
	• management of the environment, for example:
	  • ergonomics
	  • climate
	  • noise
	• management of work, for example:
	  • minimising re-working
	  • sequencing tasks

Unit Sector(s)

Industry Capability - Workplace Effectiveness

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BSBWOR202A Organise and complete daily work activities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to organise and complete work activities, and to obtain feedback on work performance. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals developing basic skills and knowledge for working in a broad range of settings.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Organise work schedule	1.1. Negotiate and agree upon work goals and plans with assistance from ***appropriate persons*** 1.2. Develop an understanding of the relationship between individual work goals and plans, and organisational goals and plans 1.3. Plan and prioritise workload within allocated timeframes
2. Complete work tasks	2.1. Complete tasks within designated time lines and in accordance with ***organisational requirements*** and instructions 2.2. Use effective questioning to seek assistance from ***colleagues*** when difficulties arise in achieving allocated tasks 2.3. Identify ***factors affecting work requirements*** and take appropriate action 2.4. Use ***business technology*** efficiently and effectively to complete work tasks 2.5. Communicate progress of task to supervisor or colleagues as required
3. Review work performance	3.1. Seek ***feedback*** on work performance from supervisors or colleagues 3.2. Monitor and adjust work according to ***feedback*** obtained through supervision and comparison with established team and organisational ***standards*** 3.3. Identify and plan ***opportunities for improvement*** in liaison with colleagues

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to use written and oral information about workplace requirements • organising skills to arrange work priorities and arrangements • problem-solving skills to solve routine problems • technology skills to select and use technology appropriate for a task.
Required knowledge

• key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  • anti-discrimination legislation
  • ethical principles
  • codes of practice
  • privacy laws
  • occupational health and safety (OHS)
• organisational policies, plans and procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • organising and completing own work activities • seeking and acting on feedback from clients, colleagues and supervisors • using available business technology appropriate to the task, under direct instruction
Context of and specific resources for	Assessment must ensure:

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EVIDENCE GUIDE	
assessment	• access to an actual workplace or simulated environment • access to office equipment and resources • examples of work plans, policies and procedures.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • review of documentation planning and prioritising workload • evaluation of time line required to complete tasks • review of documentation planning opportunities for improvement.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Appropriate persons may include:	• colleagues • other staff members • supervisors, mentors or trainers
Organisational requirements may include:	• access and equity principles and practice • anti-discrimination and related policy • business and performance plans • ethical standards

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RANGE STATEMENT	
	• goals, objectives, plans, systems and processes • legal and organisation policies, guidelines and requirements • OHS policies, procedures and programs • quality and continuous improvement processes and standards
Colleagues may include:	• coach/mentor • other members of the organisation • peers/work colleagues/team • supervisor or manager
Factors affecting work requirements may include:	• changes to procedures or new procedures • competing work demands • environmental factors such as time, weather • other work demands • resource issues • technology/equipment breakdowns
Business technology may include:	• computer applications • computers • electronic diaries • facsimile machines • photocopiers • printers • scanners
Feedback on performance may include:	• formal/informal performance appraisals • obtaining feedback from clients • obtaining feedback from supervisors and colleagues • personal, reflective behaviour strategies • routine organisational methods for monitoring service delivery
Standards may include:	• Australian Standards • legal and organisation policies, guidelines and requirements • legislation • organisational policies and procedures • specified work standards • standards set by work group
Opportunities for improvement may include:	• coaching, mentoring and/or supervision • internal/external training provision • personal study

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RANGE STATEMENT	
	• recognition of current competence (RCC)/skills recognition/initial assessment • workplace skills assessment

Unit Sector(s)

Unit sector	

Competency field

Competency field	Industry Capability - Workplace Effectiveness

Co-requisite units

Co-requisite units		

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BSBWOR203B Work effectively with others

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0.* Revised unit. Required knowledge and Range Statement changed to include environmentally sustainable practices Replaces BSBWOR203A Work effectively with others

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to work in a group environment promoting team commitment and cooperation, supporting team members and dealing effectively with issues, problems and conflict.

Application of the Unit

This unit applies to individuals who perform a range of routine tasks using a limited range of practical skills and fundamental knowledge of teamwork in a defined context under direct supervision or with limited individual responsibility.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria

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Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Develop effective workplace relationships	1.1 Identify own ***responsibilities and duties*** in relation to ***workgroup members*** and undertake activities in a manner that promotes cooperation and good relationships 1.2 Take time and resource constraints into account in fulfilling work requirements of self and others 1.3 Encourage, acknowledge and act upon constructive ***feedback*** provided by others in the workgroup
2. Contribute to workgroup activities	2.1 Provide ***support to team members*** to ensure workgroup goals are met 2.2 Contribute constructively to workgroup goals and tasks according to organisational requirements 2.3 Share ***information*** relevant to work with workgroup to ensure designated goals are met 2.4 Identify and plan ***strategies/opportunities for improvement*** of workgroup in liaison with workgroup
3. Deal effectively with issues, problems and conflict	3.1 Respect differences in personal values and beliefs and their importance in the development of relationships 3.2 Identify any linguistic and cultural differences in communication styles and respond appropriately 3.3 Identify issues, problems and conflict encountered in the workplace 3.4 Seek assistance from workgroup members when issues, problems and conflict arise and suggest possible ways of dealing with them as appropriate or refer them to the appropriate person

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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- literacy skills to read and understand the organisation's policies and work procedures, to write simple instructions for particular routine tasks and to interpret information gained from correspondence
- communication skills to request advice, to receive feedback and to work with a team
- technology skills to select and use technology appropriate to a task
- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety (OHS)
  - environmentally sustainable work practices
- organisational policies, plans and procedures
- workgroup member responsibilities and duties, and relationship to individual responsibilities and duties.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • providing support to team members to ensure goals are met • seeking feedback from clients and/or colleagues and taking appropriate action • knowledge of appropriate conflict resolution techniques.

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Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of customer complaints or staff conflict.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • observation of demonstrated techniques in resolving conflict • observation of presentations • review of documentation identifying and planning strategies/opportunities for workgroup improvement.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • interpersonal communication units • other industry capability units.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Responsibilities and duties may include:	• Code of Conduct • job description and employment arrangements • organisation's policy relevant to work role • skills, training and competencies • supervision and accountability requirements including OHS • environmentally sustainable working practices • team structures.

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Workgroup members may include:	• coach/mentor • other members of the organisation • peers/work colleagues/team/enterprise • supervisor or manager.
Feedback on performance may include:	• formal/informal performance appraisals • obtaining feedback from clients • obtaining feedback from supervisors and colleagues • personal, reflective behaviour strategies • routine organisational methods for monitoring service delivery.
Support to team members may include:	• explaining/clarifying • helping colleagues • problem-solving • providing encouragement • providing feedback to a team member • undertaking extra tasks if necessary.
Information to be shared may include:	• acknowledging satisfactory performance • acknowledging unsatisfactory performance • assisting a colleague • clarifying the organisation's preferred task completion methods • encouraging colleagues • open communication channels • workplace hazards, risks and controls.
Strategies/opportunities for improvement may include:	• career planning/development • coaching, mentoring and/or supervision • formal/informal learning programs • internal/external training provision • performance appraisals • personal study • recognition of current competence (RCC)/skills recognition/initial assessment • work experience/exchange/opportunities • workplace skills assessment.

Unit Sector(s)

Industry Capability – Workplace Effectiveness

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Custom Content Section

Not applicable.

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BSBWOR204A Use business technology

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to select, use and maintain a range of business technology. This technology includes the effective use of computer software to organise information and data. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who use business technology to perform a range of routine tasks. They use a limited range of practical skills and fundamental knowledge of equipment use and the organisation of data or files in a defined context, under direct supervision or with limited individual responsibility.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Select and use technology	1.1. Select appropriate ***technology*** and ***software applications*** to achieve the requirements of the task 1.2. Adjust workspace, furniture and equipment to suit user ergonomic requirements 1.3. Use technology according to ***organisational requirements*** and in a way which promotes a safe work environment
2. Process and organise data	2.1. Identify, open, generate or amend files and records according to task and organisational requirements 2.2. Operate ***input devices*** according to organisational requirements 2.3. ***Store data*** appropriately and exit applications without damage to or loss of, data 2.4. Use manuals, training booklets and/or online help or help-desks to overcome basic difficulties with applications
3. Maintain technology	3.1. Identify and replace used ***technology consumables*** in accordance with manufacturer's instructions and organisational requirements 3.2. Carry out and/or arrange ***routine maintenance*** to ensure equipment is maintained in accordance with manufacturer's instructions and organisational requirements

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ELEMENT	PERFORMANCE CRITERIA
	3.3. ***Identify equipment faults*** accurately and take action in accordance with manufacturer's instructions or report fault to designated person

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to identify work requirements; to understand and process basic, relevant workplace information; and to follow written instructions • communication skills to request advice, to receive feedback and to work with a team • problem-solving skills to solve routine technology problems.
Required knowledge

• key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  • anti-discrimination legislation
• ethical principles
  • codes of practice
  • privacy laws
  • occupational health and safety (OHS)
• organisational policies, plans and procedures, especially in regard to file-naming and storage conventions
• organisational IT procedures including back-up and virus protection procedures
• basic technical terminology in relation to reading help-files and manuals.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • selection and application of appropriate equipment and software applications in relation to assigned task/s • access, retrieval and storage of required data • performance of basic maintenance on a range of office equipment
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of files and data for storage • manuals and training booklets for equipment.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of office equipment • evaluation of maintaining technology.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • IT use units • other industry capability units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised

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RANGE STATEMENT	
wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Technology may include:	• computer technology, such as laptops and personal computers • digital cameras • modems • printers • scanners • zip drives • photocopiers • shredders • binders • laminators • cutters
Software applications may include:	• email, internet • word processing, spreadsheet, database, accounting or presentation packages
Organisational requirements may include:	• correctly identifying and opening files • legal and organisation policies, guidelines and requirements • locating data • log-on procedures • manufacturer's guidelines • OHS policies, procedures and programs • saving and closing files • storing data
Input devices may include:	• keyboard • mouse • numerical key pad • scanner
Storage of data may include:	• appropriate storage/filing of hard copies of computer generated documents • storage in directories and sub-directories • storage on CD-ROMs, hard and floppy disk drives or back-up systems
Technology consumables may include:	• back-up tapes • CD-ROM • floppy disks

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RANGE STATEMENT	
	• print heads • printer ribbons and cartridges • toner cartridges • zip disks
Routine maintenance may include:	• in-house cleaning and servicing of equipment according to manufacturer's guidelines • periodic servicing by qualified or manufacturer approved, technician • regular checking of equipment • replacing consumables
Identifying equipment faults may include:	• checking repairs have been carried out • encouraging feedback from work colleagues • keeping a log book of detected faults • preparing a maintenance program • regular back-ups of data • regular OHS inspections • routine checking of equipment

Unit Sector(s)

Unit sector	

Competency field

Competency field	Industry Capability - Workplace Effectiveness

Co-requisite units

Co-requisite units		

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BSBWOR301B Organise personal work priorities and development

Modification History

Release	Comments
Release 1	This version first released with *BSB07 Business Training Package version 6.0* Revised unit. Performance criteria and required skills updated to focus on learning and development practices, KPIs and compliance with policy and procedures. Replaces BSBWOR301A Organise personal work priorities and development

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to organise own work schedules, to monitor and obtain feedback on work performance, and to maintain required levels of competence. Operators may exercise discretion and judgement using appropriate theoretical knowledge of work scheduling and performance improvement to provide technical advice and support to a team.

Application of the Unit

This unit applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Organise and complete own work schedule	1.1 Ensure that ***work goals, objectives*** or ***KPIs*** are understood, negotiated and agreed in accordance with ***organisational requirements***
	1.2 Assess and prioritise workload to ensure tasks are completed within identified timeframes
	1.3 Identify ***factors affecting the achievement of work objectives*** and incorporate contingencies into work plans
	1.4 Use ***business technology*** efficiently and effectively to manage and monitor scheduling and completion of tasks
2. Monitor own work performance	2.1 Accurately monitor and adjust personal work performance through self-assessment to ensure achievement of tasks and compliance with legislation and work processes or KPIs
	2.2 Ensure that ***feedback on performance*** is actively sought and evaluated from colleagues and clients in the context of individual and group requirements
	2.3 Routinely identify and report on variations in the quality of and ***products and services*** according to organisational requirements
	2.4 Identify ***signs of stress*** and effects on ***personal wellbeing***
	2.5 Identify ***sources of stress*** and access appropriate ***supports and resolution strategies***
3. Coordinate personal skill development and learning	3.1 Identify personal learning and professional development needs and skill gaps using self-assessment and advice from colleagues and clients in relation to role and organisational requirements
	3.2 Identify, prioritise and plan opportunities for undertaking personal skill development activities in liaison with work groups and relevant personnel
	3.3 Access, complete and record ***professional development***

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	opportunities to facilitate continuous learning and career development 3.4 Incorporate formal and informal feedback into review of further learning needs

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to give and receive constructive feedback relating to development needs
- literacy skills to read and understand the organisation's procedures
- planning skills to organise work priorities according to work goals and objectives
- problem-solving skills to solve routine problems
- self-management skills to:
  - comply with policies and procedures
  - consistently evaluate and monitor own performance
  - seek learning opportunities.

Required knowledge

- key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety (OHS)
- organisational policies, plans and procedures
- methods to elicit, analyse and interpret feedback
- principles and techniques of goal setting, measuring performance, time management and personal assessment
- competency standards and how to interpret them in relation to self
- methods to identify and prioritise personal learning needs.

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Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • preparing work plans • scheduling and prioritising work objectives and tasks • knowledge of the principles and techniques of goal setting, measuring performance, time management and personal assessment.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of work schedules and performance improvement plans.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of self-assessment documentation outlining learning and development needs • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of methods to identify and prioritise personal learning needs • evaluation of planning for personal skill development activities and professional development opportunities.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Work goals and objectives may include:	• budgetary targets • production targets • reporting deadlines • sales targets • team and individual learning goals • team participation.
KPIs may include:	• key performance indicators on customer satisfaction • key performance indicators on customer effort • monitoring time taken to answer calls • operating within reporting protocols • score tools such as net promoter • understanding metrics.
Organisational requirements may include:	• access and equity principles and practice • business and performance plans • defined resource parameters • ethical standards • goals, objectives, plans, systems and processes • legal and organisational policies, guidelines and requirements • OHS policies, procedures and programs • quality and continuous improvement processes and standards • quality assurance and/or procedures manuals.
Factors affecting the achievement of work objectives may include:	• budget constraints • competing work demands • environmental factors such as time, weather • resource and materials availability • technology/equipment breakdowns • unforeseen incidents • workplace hazards, risks and controls.
Business technology may include:	• computer applications • computers • email

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	• facsimile machines • internet/extranet/intranet • modems • personal schedulers • photocopiers • printers • scanners.
Feedback on performance may include:	• formal/informal performance appraisals • obtaining feedback from clients • obtaining feedback from supervisors and colleagues • personal, reflective behaviour strategies • routine organisational methods for monitoring service delivery.
Products and services may include:	• either products or services • goods • ideas • infrastructure • private or public sets of benefits.
Signs of stress may include:	• absence from work • alcohol or other substance abuse • conflict • poor work performance.
Personal wellbeing may include:	• cultural • emotional • social • spiritual.
Sources of stress may include:	• complex tasks • cultural issues • work and family conflict • workloads.
Supports and resolution strategies may include:	• awareness raising • counselling • employee assistance programs (EAP) • family support • group activities • job design • mediation • sharing load • time off • training.
Professional development	• career planning/development

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opportunities may include:	• coaching, mentoring and/or supervision • formal/informal learning programs • internal/external training provision • performance appraisals • personal study • quality assurance assessments and recommendations • recognition of current competence/skills recognition • work experience/exchange/opportunities • workplace skills assessment.

Unit Sector(s)

Industry Capability – Workplace Effectiveness

Custom Content Section

Not applicable.

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BSBWOR302A Work effectively as an off site worker

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to negotiate and perform self managed, self directed work as an off site worker performing agreed duties at an alternative site during some or all of scheduled work hours. It is a flexible employment option that meets all legal and regulatory employment requirements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are skilled operators and apply a broad range of competencies in various off site contexts. Most commonly this will apply to people working from home or other location away from a central office or organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Negotiate off site working arrangements	1.1. Identify and include ***legal and ethical issues relating to off-site work*** in working arrangements 1.2. Identify and include worker rights and responsibilities and those of supervisor/s and the organisation, in off-site working arrangements 1.3. Agree and document off-site work ***employment conditions and agreement*** in accordance with legal requirements 1.4. Confirm ***equipment and technology requirements for off-site work***, and agree and document supply and maintenance arrangements in accordance with legal and organisational requirements 1.5. Confirm ***supervisory and performance management arrangements*** and agree to requirements for any on-site work, meetings or other in accordance with off-site work policy and practices
2. Organise off site work environment	2.1. Identify requirements for a ***safe***, ***effective off-site work environment*** in consultation with management 2.2. Obtain equipment and technology for off-site work environment in accordance with work agreement 2.3. Arrange off-site work environment in accordance

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ELEMENT	PERFORMANCE CRITERIA
	with occupational health and safety (OHS) requirements and work agreement
3. Plan off-site work schedules	3.1. Establish work objectives and priorities in consultation with management 3.2. Analyse and incorporate work requirements into personal work schedules 3.3. Identify factors affecting the achievement of work objectives and address contingencies in work schedules
4. Complete off-site work	4.1. Complete or revise work schedules in accordance with organisational requirements 4.2. Schedule and attend on-site work, meetings or events in accordance with organisational requirements 4.3. Seek assistance regarding breakdowns in work arrangements, equipment or technology and adjust work schedules in accordance with organisational requirements 4.4. Ensure work practices meet OHS requirements and the terms of the work agreement
5. Monitor and improve off-site work performance	5.1. Monitor personal performance against work requirements and schedules and identify any areas for improvement 5.2. Obtain feedback from colleagues and clients and analyse in the context of personal and organisational objectives 5.3. Evaluate off-site work processes and systems for their usefulness in assisting work outcomes and make recommendations for improvement in accordance with organisational requirements 5.4. Negotiate changes to off-site work practices and implement in accordance with organisational requirements and work agreement

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE
Required skills
• literacy skills to read and understand the organisation's procedures, own work goals and objectives • planning skills to organise work priorities and arrangements • problem-solving skills to solve routine problems • communication skills to negotiate e-work agreement • numeracy skills to negotiate salary • self-management skills to maintain motivation and to seek assistance • technology skills to select appropriate equipment.
Required knowledge

• key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  • anti-discrimination legislation
• ethical principles
  • codes of practice
  • privacy laws
  • OHS
• ethical and security issues relating to off-site e-work
• organisational policy and procedures
• roles and responsibilities of off-site worker, supervisor/s and the organisation
• barriers to successful off-site working.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • implementing off-site working arrangements • knowledge of ethical and security issues relating to off-site e-work.
Context of and specific resources for	Assessment must ensure:

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EVIDENCE GUIDE	
assessment	• access to an actual workplace or simulated environment • access to office equipment and resources • examples of off-site working arrangements.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of roles and responsibilities of off-site worker • review of evaluation of off-site work processes and systems for their usefulness in assisting work outcomes and recommendations made for improvement.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace effectiveness units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Legal and ethical issues relating to off-site work may include:	• business contents insurance against damage and theft • public liability • taxation law • workers compensation for work related injury/accident

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RANGE STATEMENT	
Employment conditions and agreement may include:	• core office hours at given site/s so customers and staff know where to contact you • employer reimbursement and/or maintenance of employee's equipment • ensuring confidentiality of all work • ensuring protection of intellectual property • formal written e-work agreement • obeying software licensing laws • OHS • overtime arrangements • performance management/appraisal • performance monitoring • protecting employer's records • reasonable notice of supervisor visits to the e-worker's work site • right to inspect e-worker's work site • right to terminate e-work agreement • salary and benefits • security of information • taxation • use of employee's own equipment • use of employer's equipment
Equipment and technology requirements for off-site work may include:	• access to business computer/network • consumables • e-worker's own equipment and software • network interface equipment • powerful computers, high speed modems, technical help line • remote access hardware • remote access software • technical support in case of hardware failure • using equipment, computer, software and data supplied by the business (company assets)
Supervisory and performance management arrangements may include:	• assessing progress • early identification and handling of problems • flexibility in supervisory practices • focus on quality of work rather than time spent • goal setting • including e-staff in office meetings, both official and social • management based on outcomes

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RANGE STATEMENT	
	• regular feedback • remote-site visits • telephone supervision
Safe**, **effective off-site work environment may include:	• accommodation for separate phone line/s if necessary for open data link, facsimile etc. • adequate lighting • ample electrical outlets • arrangements for family commitments • dedicated room or quiet area • ergonomically appropriate desks and chairs • safe deployment of electrical cords to avoid tripping, falling

Unit Sector(s)

Unit sector	

Competency field

Competency field	Industry Capability - Workplace Effectiveness

Co-requisite units

Co-requisite units		

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BSBWOR401A Establish effective workplace relationships

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to collect, analyse and communicate information and to use that information to develop and maintain effective working relationships and networks, with particular regard to communication and representation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Frontline managers play an important role in developing and maintaining positive relationships in internal and external environments so that customers, suppliers and the organisation achieve planned outputs and outcomes. They play a prominent part in motivating, mentoring, coaching and developing team cohesion through providing leadership for the team and forming the bridge between the management of the organisation and team members. At this level, work will normally be carried out within routine and non routine methods and procedures, which require planning and evaluation, and leadership and guidance of others.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Collect, analyse and communicate information and ideas	1.1. Collect relevant ***information*** from appropriate sources and analyse and share with the work team to improve work performance 1.2. Communicate ideas and information in a manner which is appropriate and sensitive to the cultural and social diversity of the audience and any specific needs 1.3. Implement ***consultation processes*** to encourage employees to contribute to issues related to their work, and promptly relay feedback to the work team in regard to outcomes 1.4. Seek and value contributions from internal and external sources in developing and refining new ideas and approaches

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ELEMENT	PERFORMANCE CRITERIA
	1.5. Implement ***processes*** to ensure that issues raised are resolved promptly or referred to ***relevant personnel*** as required
2. Develop trust and confidence	2.1. Treat all internal and external contacts with integrity, respect and empathy 2.2. Use the ***organisation's social***, ***ethical and business standards*** to develop and maintain effective relationships 2.3. Gain and maintain the trust and confidence of ***colleagues***, ***customers and suppliers*** through competent performance 2.4. Adjust interpersonal styles and methods to meet organisation's social and cultural environment 2.5. Encourage other members of the work team to follow examples set, according to ***organisation's policies and procedures***
3. Develop and maintain networks and relationships	3.1. Use ***networks*** to identify and build relationships 3.2. Use networks and other work relationships to provide identifiable benefits for the team and organisation
4. Manage difficulties into positive outcomes	4.1. Identify and analyse difficulties, and take action to rectify the situation within the requirements of the organisation and relevant legislation 4.2. Guide and support colleagues to resolve work difficulties 4.3. Regularly review and improve ***workplace outcomes*** in consultation with relevant personnel 4.4. Manage ***poor work performance*** within the organisation's processes 4.5. Manage conflict constructively within the organisation's processes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• coaching and mentoring skills to provide support to colleagues

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REQUIRED SKILLS AND KNOWLEDGE

• literacy skills to research, analyse, interpret and report information
• relationship management and communication skills to:
  • deal with people openly and fairly
  • forge effective relationships with internal and/or external people, and to develop and maintain these networks
  • gain the trust and confidence of colleagues
  • respond to unexpected demands from a range of people
  • use supportive and consultative processes effectively.

Required knowledge

• relevant legislation from all levels of government that affects business operation, especially in regard to occupational health and safety (OHS), and environmental issues, equal opportunity, industrial relations and anti-discrimination
• theory associated with managing work relationships to achieve planned outcomes:
  • developing trust and confidence
  • maintaining consistent behaviour in work relationships
  • understanding the cultural and social environment
  • identifying and assessing interpersonal styles
  • establishing, building and maintaining networks
  • identifying and resolving problems
  • resolving conflict
  • managing poor work performance
  • monitoring, analysing and introducing ways to improve work relationships.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • range of methods and techniques for communicating information and ideas to a range of stakeholders • range of methods and techniques for developing positive work relationships that build trust and

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EVIDENCE GUIDE	
	confidence in the team • accessing and analysing information to achieve planned outcomes • techniques for resolving problems and conflicts and dealing with poor performance • knowledge of the theory associated with managing work relationships to achieve planned outcomes.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • demonstration of techniques in managing poor performance and communicating effectively • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of relevant legislation • review of consultation processesimplemented to encourage employees to contribute to issues related to their work • review of documentation outlining reviewing ofworkplace outcomes.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Frontline Management.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised

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RANGE STATEMENT	
wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information may include:	• data appropriate to work roles and organisational policies that is shared and retrieved in writing or verbally, electronically or manually such as: • archived, filed and historical background data • individual and team performance data • marketing and customer related data • planning and organisational documents including the outcomes of continuous improvement and quality assurance • policies and procedures
Consultation processes may include:	• feedback to the work team and relevant personnel in relation to outcomes of the consultation process • opportunities for all employees to contribute to ideas and information about organisational issues
Processes to ensure that issues raised are resolved promptly or referred may include:	• conducting informal meetings • coordinating surveys or questionnaires • distributing newsletters or reports • exchanging informal dialogue with relevant personnel • participating in planned organisational activities
Relevant personnel may include:	• managers • OHS committee and other people with specialist responsibilities • other employees • supervisors • union representatives/groups
Organisation's social, ***ethical and business standards*** may refer to:	• implied standards such as honesty and respect relative to the organisational culture and generally accepted within the wider community • rewards and recognition for high performing staff

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RANGE STATEMENT	

	• standards expressed in legislation and regulations such as anti-discrimination legislation
	• written standards such as those expressed in:
	  • code of workplace conduct/behaviour
	  • dress code
	  • policies
	  • statement of workplace values
	  • vision and mission statements

Colleagues, customers and suppliers may include:	• both internal and external contacts • employees at the same level and more senior managers • people from a wide variety of social, cultural and ethnic backgrounds • team members
Organisation's policies and procedures may refer to:	• Materials Safety Data Sheets • organisational tasks and activities undertaken to meet performance outcomes • sets of accepted actions approved by the organisation • Standard Operating Procedures
Networks may be:	• established structures or unstructured arrangements and may include business or professional associations • informal or formal and with individuals or groups • internal and/or external
Workplace outcomes may include:	• OHS processes and procedures • performance of the work team
Poor work performance may refer to:	• individual team members • organisation as a whole • self • whole work team

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Industry Capability - Workplace Effectiveness

Co-requisite units

Co-requisite units		

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BSBWOR402A Promote team effectiveness

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to promote teamwork. It involves developing team plans to meet expected outcomes, leading the work team, and proactively working with the management of the organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	Frontline managers have an important leadership role in the development of efficient and effective work teams. They play a prominent part in team planning, supervising the performance of the team and developing team cohesion. They provide leadership for the team and bridge the gap between the management of the organisation and the team members. As such they must 'manage up' as well as manage their team/s.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Plan to achieve team outcomes	1.1. Identify, establish and document ***team purpose***, ***roles***, ***responsibilities***, ***goals***, ***plans and objectives*** in ***consultation*** with team members 1.2. Support team members in meeting expected outcomes
2. Develop team cohesion	2.1. Provide opportunities for input of team members into planning, decision making and operational aspects of work team 2.2. Encourage and support team members to take ***responsibility for own work*** and to assist each other in undertaking required roles and responsibilities 2.3. Provide ***feedback*** to team members to encourage, value and reward individual and team efforts and contributions 2.4. Recognise and address issues, concerns and problems identified by team members or refer to ***relevant persons*** as required

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ELEMENT	PERFORMANCE CRITERIA
3. Participate in and facilitate work team	3.1. Actively encourage team members to participate in and take responsibility for team activities and communication processes 3.2. Give the team support to identify and resolve problems which impede its performance 3.3. Ensure own contribution to work team serves as a role model for others and enhances the organisation's image within the work team, the organisation and with clients/customers
4. Liaise with management	4.1. Maintain open ***communication*** with ***line manager***/***management*** at all times 4.2. Communicate information from line manager/management to the team 4.3. Communicate unresolved issues, concerns and problems raised by the team/team members to line manager/management and ensure follow-up action is taken 4.4. Communicate unresolved issues, concerns and problems related to the team/team members raised by line managers/management to the team and ensure follow-up to action is taken

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - boost team morale
  - deal with team conflict
  - deliver messages from management
  - facilitate discussion
  - mentor and coach
- leadership skills
- planning and organising skills.

Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE

• organisational goals, objectives and plans
• organisational policy and procedures framework
• organisational structure, including organisational chart
• principles and techniques associated with:
  • delegation and work allocation
  • goal setting
  • group dynamics and processes
  • individual behaviour and difference
  • leadership
  • motivation
  • negotiation
  • planning.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • teamwork plan with details of how it was generated and how it will be monitored so that team goals can be met • techniques in communicating information, dealing with team conflict and resolving issues • knowledge of organisational goals, objectives and plans.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios

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EVIDENCE GUIDE	
	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in working with team dynamics • observation of performance in role plays • oral or written questioning to assess knowledge of principles and techniques associated with group dynamics and processes • evaluation of opportunities provided for input of team members into planning, decision making and operational aspects of work team • review of feedback provided to team members • review of teamwork plan.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Frontline Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Team purpose, ***roles***, ***responsibilities***, ***goals***, ***plans and objectives*** may include:	• action plans, business plans and operational plans linked to strategic plans • expected outcomes and outputs • goals for individuals and the work team • individual and team performance plans and key performance indicators • occupational health and safety (OHS) responsibilities
Consultation may include:	• attending meetings, interviews, brainstorming sessions

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RANGE STATEMENT	
	• using email/intranet communications, newsletters or other processes and devices which ensure that all employees have the opportunity to contribute to team and individual effectiveness • using mechanisms to provide feedback to the work team in relation to consultation outcomes
Responsibility for own work may involve:	• individual and joint actions • individuals and teams
Feedback may refer to:	• formal/informal gatherings between team members where there is communication on work related matters • informal communication of ideas and thoughts on specific tasks, outcomes, decisions, issues or behaviours
Relevant persons may include:	• colleagues • direct superior or other management representatives • OHS committees and other people with specialist responsibilities
Communication may include:	• face-to-face • formal/informal interaction • verbal, written or electronic communication
Line manager*/*management may refer to:	• direct superior or other management representatives

Unit Sector(s)

Unit sector	

Competency field

Competency field	Management and Leadership - Management

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Co-requisite units

Co-requisite units		

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BSBWOR403A Manage stress in the workplace

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage own stress and the stress of others stress in a team environment. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to the understanding and management of own stress and team stress in the workplace. Competence in this unit requires managing own stress and managing the stress within a team by using effective strategies and initiatives to reduce stress and to improve the resilience of staff to withstand the stresses associated with a customer contact environment. This will require application of sound occupational health and safety (OHS) management in accordance with legislation and organisational policies and guidelines. This role is undertaken by staff with managerial responsibility.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop and implement personal stress management strategy	1.1. Recognise ***signs and sources of stress*** 1.2. Use appropriate techniques to manage own stress 1.3. Maintain personal stamina and resilience 1.4. Maintain personal work/life balance 1.5. Become a role model in managing stress and time
2. Develop stress management strategies and techniques within a team	2.1. Analyse and understand potential ***sources of fatigue*** and stress in the work environment 2.2. Develop an understanding of a range of ***stress management techniques*** within a team 2.3. Develop techniques to support the achievement of ***key performance indicators*** (***KPIs***) ***and priorities*** 2.4. Encourage team members to support each other in managing stress 2.5. Adopt strategies to effectively reduce, manage and

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ELEMENT	PERFORMANCE CRITERIA
	deal with stress within a team 2.6. Adopt ***stamina management strategies*** to maximise performance 2.7. Develop techniques to assist team members to recover effectively from a ***stressful or difficult situation***
3. Implement stress management techniques within a team	3.1. Adopt work routine and procedural strategies to minimise stress and fatigue within a team 3.2. Use appropriate ***time management tools and techniques*** 3.3. Develop individual/group training and development program as required 3.4. Use team meetings and other opportunities to discuss stress management techniques and to coach staff in using these techniques 3.5. Regularly evaluate tools, techniques and strategies 3.6. Develop team awareness of sources of internal and external support
4. Develop team and morale building strategies	4.1. Develop a strategy to engage and develop team members 4.2. Develop a communication strategy within a team 4.3. Manage and use team meetings effectively 4.4. Develop a supportive and responsive team environment 4.5. Delegate effectively to further empower and motivate team members
5. Monitor and address stress levels within a team	5.1. Monitor individual staff performance against performance requirements 5.2. Conduct regular staff reviews to identify variations and difficulties impacting on work requirements 5.3. Monitor and support team members when in stressful situations 5.4. Respond appropriately to behavioural signs of stress among team members 5.5. Monitor work/life balance of team members 5.6. Discuss outcomes and develop action plans with team members as appropriate

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• coaching and mentoring skills to give feedback in difficult and tense situations • communication skills to conduct effective formal and informal meetings and to communicate with personnel at all levels of the organisation • communication skills to relate to people from diverse backgrounds and people with diverse abilities • consultation and negotiation skills to establish and implement development plans and actions for team members • interpersonal skills to establish rapport and to build relationships with team members • leadership skills to gain the trust and confidence of colleagues and team members • literacy skills to clearly articulate information, ideas and advice • organisational skills to manage own tasks within timeframes • problem-solving skills to creatively and positively address issues that arise • self-management skills to be an excellent role model for a team • team building skills to ensure cohesion within a team.
Required knowledge
• behavioural management techniques • internal and external sources of assistance • job role priorities and KPIs • OHS principles and requirements • signs and sources of existing and potential stress or difficult situations • stress management and reduction techniques • time management tools and techniques • workplace policies and procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • explanation of signs and sources of stress • explanation of job role priorities and KPIs • ability or strategy to recover from stressful contact • work stamina and implementation of work/life management strategies • knowledge of OHS principles and requirements.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace information and data • access to performance management, development plan and training records • access to relevant legislation, standards and guidelines • access to staff feedback and satisfaction survey records.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral and/or written questioning to assess knowledge of signs and sources of stress, and time management tools and techniques • direct observation of the candidate effectively managing time and work priorities • oral and /or written questioning of the process for the candidate to work through and recover from a stressful situation with a team member during and after the situation • review and analysis of attendance records • review of development plans and feedback for team members • review of minutes of team meetings.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • relevant management units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Signs of stress may include:	• absence from work • conflict • fatigue • lack of self-esteem and confidence • poor work performance • sickness
Sources of stress may include:	• challenging KPIs and/or priorities • complex tasks • difficult customer contact • external factors • inadequate physical environment • interpersonal relationships
Sources of fatigue may include:	• ergonomic factors • excessive overtime • external issues • overload of information • repetitive tasks and/or contacts • shift rostering and hours of work
Stress management techniques may include:	• debriefing with peers and/or line manager • relaxation methods • specific training • stretching and exercises • taking breaks
Key performance indicators (***KPIs***) ***and priorities*** may include:	• adherence to schedule • average handling time • call rates • customer satisfaction feedback • quality assurance requirements • sales targets • targets
Stamina management strategies	• management of personal wellbeing, for example:

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RANGE STATEMENT	
may include:	• breaks • hydration • life balance • meals • recognising fatigue • management of the environment, for example: • climate • ergonomics • noise • management of work, for example: • minimising re-working • sequencing tasks
Stressful or difficult situations may include:	• angry customer • changing regulations and legislation • customer abuse • customer complaint • high number of customer contacts • sensitive customer situations • unreliable technology
Time management tools and techniques may include:	• diarising and/or scheduling tasks and time • organising information • prioritising tasks • self-managing training requirements

Unit Sector(s)

Unit sector	

Competency field

Competency field	Industry Capability - Workplace Effectiveness

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Co-requisite units

Co-requisite units		

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BSBWOR404B Develop work priorities

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan one's own work schedules, to monitor and to obtain feedback on work performance and development. It also addresses the requirement to take responsibility for one's own career planning and professional development. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are required to design their own work schedules and work plans, and to establish priorities for their work. They will typically hold some responsibilities for the work of others and have some autonomy in relation to their own role.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan and complete own work schedule	1.1. Prepare ***Workgroup*** plans which reflect consideration of resources, client needs and workgroup targets 1.2. Analyse and incorporate ***Work objectives*** and priorities into personal schedules and responsibilities 1.3. Identify ***Factors affecting the achievement of work objectives*** and establish contingencies and incorporate them into work plans 1.4. Efficiently and effectively use ***Business technology*** to manage and monitor planning completion and scheduling of tasks
2. Monitor own work performance	2.1. Identify and analysed personal performance through self-assessment and feedback from others on the achievement of work objectives 2.2. Seek and evaluate ***Feedback on performance*** from colleagues and clients in the context of individual and group requirements 2.3. Routinely identify and report on variations in the quality of service and performance in accordance with organisational requirements
3. Coordinate	3.1. Assess personal knowledge and skills against

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ELEMENT	PERFORMANCE CRITERIA
professional development	organisational benchmarks to determine development needs and priorities 3.2. Research and identify sources and plan for opportunities for improvement in consultation with colleagues 3.3. Use ***Feedback*** to identify and develop ways to improve competence within available opportunities 3.4. Identify, access and complete ***professional development activities*** to assist career development 3.5. Store and maintain records and documents relating to achievements and assessments in accordance with organisational requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- learning skills to recognise and develop new and necessary skills and knowledge
- literacy skills to understand the organisation's policies, procedures and communications, to write personal work plans and professional development plans, and to request and receive feedback about performance
- organising skills to prioritise, manage time and meet deadlines
- problem solving skills to develop contingency plans

Required knowledge

- knowledge of relevant business technology applications to schedule tasks and plan work
- knowledge of techniques to prepare personal plans and establish priorities
- methods to identify and prioritise personal learning needs
- understanding of a range of professional development options
- understanding of methods to elicit, analyse and interpret feedback
- understanding of methods to evaluate own performance

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • preparing and communicating own work plan • scheduling work objectives and tasks to support the achievement of goals • seeking and acting on feedback from clients and colleagues • reviewing own work performance against achievements through self-assessment • accessing learning opportunities to extend own personal work competencies • using business technology to monitor self development.
Context of and specific resources for assessment	Assessment must ensure: • the learner and trainer should have access to appropriate documentation and resources normally used in the workplace
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • review of work and professional development plans.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • Other units from the Certificate IV in Frontline Management.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Workgroup plans may include:	• budgetary plans • production plans • reporting plans • sales plans • team and individual learning goals • team participation • work schedules
Work objectives may include:	• budgetary targets • production targets • reporting deadlines • sales targets • team and individual learning goals • team participation
Factors affecting the achievement of work objectives may include:	• budget constraints • competing work demands • environmental factors such as time, weather, etc • personnel • resource and materials availability • technology/equipment breakdowns • unforeseen incidents
Business technology may include:	• computer applications • computers • email and internet/intranet/extranet • facsimile machines • modems • personal schedules • photocopiers • printers • scanners
Feedback on performance may include:	• formal/informal performance appraisals • obtaining comments from clients • obtaining comments from supervisors and

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RANGE STATEMENT	
	colleagues • personal, reflective behaviour strategies • routine organisational methods for monitoring service delivery
Professional development activities may include:	• career planning/development • coaching, mentoring and/or supervision • formal/informal learning programs • internal/external training provision • performance appraisals • personal study • Recognition of Prior Learning • work experience/exchange/opportunities • workplace skills assessment

Unit Sector(s)

Unit sector	

ELEMENT	PERFORMANCE CRITERIA

Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBWOR501B Manage personal work priorities and professional development

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage own performance and professional development. Particular emphasis is on setting and meeting priorities, analysing information and using a range of strategies to develop further competence. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to managers and focuses on the need for managers to be organised, focussed and skilled, in order to effectively manage the work of others. As such it is an important unit for most managers, particularly as managers serve as role models and have a significant influence on the work culture and patterns of behaviour.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish personal work goals	1.1. Serve as a positive role model in the workplace through personal work planning and organisation 1.2. Ensure personal work goals, plans and activities reflect the organisation's plans, and ***own responsibilities and accountabilities*** 1.3. Measure and maintain personal performance in varying work conditions, work contexts and contingencies
2. Set and meet own work priorities	2.1. Take initiative to prioritise and facilitate competing demands to achieve personal, team and organisational goals and objectives 2.2. Use ***technology*** efficiently and effectively to manage work priorities and commitments 2.3. Maintain appropriate work-life balance, and ensure stress is effectively managed and health is attended to
3. Develop and maintain professional competence	3.1. Assess personal knowledge and skills against ***competency standards*** to determine development needs, priorities and plans 3.2. Seek feedback from employees, ***clients and colleagues*** and use this feedback to identify and

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ELEMENT	PERFORMANCE CRITERIA
	develop ways to improve competence 3.3. Identify, evaluate, select and use ***development opportunities*** suitable to personal learning style/s to develop competence 3.4. Undertake participation in networks to enhance personal knowledge, skills and work relationships 3.5. Identify and develop new skills to achieve and maintain a competitive edge

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to receive, analyse and report on feedback • literacy skills to interpret written and verbal information about workplace requirements • organisational skills to set and achieve priorities.
Required knowledge

• principles and techniques involved in the management and organisation of:
  • performance measurement
  • personal behaviour, self-awareness and personality traits identification
  • personal development plan
  • personal goal setting
  • time management
• management development opportunities and options for self
• organisation's policies, plans and procedures
• types of learning style/s and how they relate to the individual
• types of work methods and practices that can improve personal performance.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the

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EVIDENCE GUIDE	
performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • systems and processes (electronic or paper-based) used to organise and prioritise tasks, which show how work is managed • personal development plan, with career objectives and an action plan
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to asses knowledge of work methods and practices that can improve personal performance • review of personal work goals, plans and activities • evaluation of work-life balance • review of documentation assessing personal knowledge and skills against competency standards.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Management.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different

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RANGE STATEMENT	
work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Own responsibilities and accountabilities may include:	• expectations of workplace performance as expressed in a performance plan • outputs as expressed in position descriptions or duty statements • statement of conduct outlining an individual's responsibilities/actions/performance
Technology may include:	• computerised systems and software, databases, project management and word processing • electronic diary • personal digital assistant (PDA)
Competency standards may include:	• enterprise-specific units of competency consistent with work requirements • nationally endorsed units of competency consistent with work requirements
Clients and colleagues may be:	• colleagues at the same level and more senior managers • internal or external customers • people from a wide range of social, cultural and ethnic backgrounds and with a range of physical and mental abilities • team members
Development opportunities may include:	• action learning • coaching • exchange/rotation • induction • mentoring • shadowing • structured training programs

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Management and Leadership - Management

Co-requisite units

Co-requisite units		

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BSBWOR502B Ensure team effectiveness

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to facilitate all aspects of teamwork within the organisation. It involves taking a leadership role in the development of team plans, leading and facilitating teamwork and actively engaging with the management of the organisation. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to managers and addresses the need for managers to facilitate work teams and to build a positive culture within work teams. The unit takes a systematic and planned approach to developing teams. It includes the soft skills as well as more structured approaches to the management of teams. At this level, work will normally be carried out within complex and diverse methods and procedures which require the exercise of considerable discretion and judgement, using a range of problem solving and decision making strategies.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Establish team performance plan	1.1. ***Consult*** team members to establish a common understanding of team purpose, roles, responsibilities and ***accountabilities*** in accordance with organisational goals, plans and objectives 1.2. Develop ***performance plans*** to establish expected ***outcomes***, ***outputs***, ***key performance indicators*** and goals for work team 1.3. ***Support*** team members in meeting expected performance outcomes
2. Develop and facilitate team cohesion	2.1. Develop ***strategies*** to ensure team members have input into planning, decision making and operational aspects of work team 2.2. Develop ***policies and procedures*** to ensure team members take responsibility for own work and assist

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ELEMENT	PERFORMANCE CRITERIA
	others to undertake required roles and responsibilities 2.3. Provide feedback to team members to encourage, value and reward individual and team efforts and contributions 2.4. Develop ***processes*** to ensure that issues, concerns and problems identified by team members are recognised and addressed
3. Facilitate teamwork	3.1. Encourage team members and individuals to participate in and to take responsibility for team activities, including communication processes 3.2. Support the team in identifying and resolving work performance problems 3.3. Ensure own contribution to work team serves as a role model for others and enhances the organisation's image for all ***stakeholders***
4. Liaise with stakeholders	4.1. Establish and maintain open communication processes with all stakeholders 4.2. Communicate information from ***line manager***/***management*** to the team 4.3. Communicate unresolved issues, concerns and problems raised by team members and follow-up with line manager/management and other relevant stakeholders 4.4. Evaluate and take necessary corrective action regarding unresolved issues, concerns and problems raised by internal or external stakeholders

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to explain team goals, to address team conflict and to build an environment of trust • planning and organisational skills to keep team on track and focussed on work outcomes.
Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE
• group behaviour • strategies for mentoring and coaching to informally guide and instruct team members • issue resolution • strategies for gaining consensus.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • range of techniques that can be used to build work teams, strengthen communications in the team and resolve issues • methods for engaging with stakeholders and obtaining advice from outside the work team, to ensure team is focussed and on track • knowledge of group behaviour.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports • demonstration of team building techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of performance in role plays • review of performance plans developed for work team • review of policies and procedures developed to

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EVIDENCE GUIDE	
	ensure team members take responsibility for own work.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Consultation may refer to:	• conducting meetings, interviews, brainstorming sessions, email/intranet communications, newsletters or other processes and devices which ensure that all employees have the opportunity to contribute to team and individual performance plans • mechanisms used to provide feedback to the work team in relation to outcomes of consultation
Accountabilities may refer to:	• responsibilities as defined in position descriptions, codes of conduct/behaviour, duty statements or similar • statement of conduct outlining responsibilities/actions/performance
Performance plans may refer to:	• individual performance plans linked to team goals • team plans based on work assignments and responsibilities
Outcomes, ***outputs***, ***key performance indicators*** may refer to agreed:	• changes in work roles and responsibilities • improved individual and team, performance and participation • improvements to systems, operations • measures for monitoring and evaluating the

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RANGE STATEMENT	
	efficiency or effectiveness of systems or services • quality standards and expectations • targets for productivity improvements such as reduced downtime, higher production levels, decreases in absenteeism • targets for training and development
Support may include:	• Coaching • Mentoring • Training and development opportunities • Clarification of roles and expectations • Long term or short term plans • Meetings
Strategies may refer to:	• clarification of roles and expectations • electronic communication devices and processes, such as intranet and email communication systems, to facilitate input • long-term or short-term plans factoring in opportunities for team input • mentoring and 'buddy' systems to support team members in providing input • newsletters and briefings • training and development activities
Policies and procedures may refer to:	• organisational guidelines and systems that govern operational functions • procedures that detail the activities that must be carried out for the completion of actions and tasks • Standard Operating Procedures
Processes may refer to:	• brainstorming options with the team for addressing concerns • creating a matrix of issues and concerns and distributing for comment • discussions with individuals regarding their concerns • distributing drafts for comment with a range of options for resolution of concerns • training and development sessions
Stakeholders may include:	• Board members • business or government contacts • funding bodies

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RANGE STATEMENT	
	• union/employee groups and representatives • work team
Line manager*/*management may refer to:	• chief executive officer • direct superior • other management representatives

Unit Sector(s)

Unit sector	

Competency field

Competency field	Industry Capability - Workplace Effectiveness

Co-requisite units

Co-requisite units		

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BSBWRK401A Develop and implement an organising plan

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop, implement and evaluate a strategic approach to organising and recruiting union members. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who have knowledge of unionism and industrial relations, and a commitment to advancing social justice principles. They provide leadership and guidance to workers and union members. Note that different organising plans may be developed for different worksites, employers and/or groups of workers.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop organising plans	1.1. Consult ***stakeholders*** to prioritise organising activities and select target sites using agreed criteria 1.2. Undertake ***research*** on target groups 1.3. Develop ***options*** for organising approaches 1.4. Draft relevant ***organising plans*** 1.5. Obtain approval for organising plans from existing members and leaders 1.6. Inform relevant union staff of the organising approach 1.7. Develop and document ***monitoring arrangements*** for organising plans
2. Implement organising plans	2.1. Ensure that strategies in the organising plans are implemented 2.2. Modify plans to meet changing circumstances 2.3. Access workers for support 2.4. Target worksites, key occupations and specific interest groups through appropriate communications
3. Evaluate organising plans	3.1. Regularly monitor implementation of organising plans 3.2. Review outcomes against objectives 3.3. Assess the success of organising plans

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ELEMENT	PERFORMANCE CRITERIA
	3.4. Prepare reports on outcomes with suggestions for future activities and improvements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• interpersonal and consultation skills to listen effectively and to ask questions • literacy skills to read and interpret a range of workplace and union documentation • project planning skills.
Required knowledge

• industrial relations history
• trade, craft , industry or occupation being targeted for recruitment
• political, social and economic issues facing workers and trade unions
• relevant legislation and regulations relating to rights and responsibilities of representatives and union members, and their implications for recruitment
• relevant employment agreements:
  • awards
  • other forms of industrial instruments
  • workplace agreements
• union information:
  • current policies, priorities and activities
  • history (general and workplace, location and industry-specific)
  • legal right of entry
  • membership information (benefits, rates and process for applying)
  • recruitment policies and procedures
  • representation processes.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the

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EVIDENCE GUIDE	
performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • organising plan with details of how it was developed and implemented to achieve defined aims and objectives • analysis of the effectiveness of the organising plan • knowledge of trade, craft , industry or occupation being targeted for recruitment.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace and union documents
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of political, social and economic issues facing workers and trade unions
Guidance information for assessment	

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and

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RANGE STATEMENT	
regional contexts) may also be included.	
Stakeholders may include:	• committees and other representative forums • members • organisers • other union personnel • peak bodies • regional, state/territory, national and international officials • relevant community groups • shop stewards, workplace representatives or union delegates
Research may include:	• characteristics of target group • current and past organising plans and their outcomes • employer background • industrial relations history • knowledge of awards or agreements • size of employer
Options may include:	• home visits • one-to-one approaches • phone calls • speaking to groups • web-based organising • working through leads
Organising plans may include:	• activities • objectives • resources • target groups • timeframes
Monitoring arrangements may include:	• exit interviews/questionnaires for resigning members • including organising in agenda of regular meetings • meetings, briefings and direct supervision • opportunities for feedback, support, advice and debriefing for workplace representatives and members • regular review of plans • statistics on new, renewing and resigning memberships

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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BSBWRK402A Empower workers

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to advance the collective interests of workers and the union in the workplace, and more generally within the community, through the identification and development of activists. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who have knowledge of unionism and industrial relations, and a commitment to advancing social justice principles. They provide leadership and guidance to workers and union members. The unit sees the development of activists and the creation of worker networks as an opportunity to empower members and to provide informal education to develop collective capacity.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Identify commonality of issues and needs	1.1. ***Canvass workplace issues*** with members and potential members 1.2. Undertake ***analysis of issue/s*** 1.3. Ensure key issues in the workplace are agreed and conform to union policies and regulations
2. Identify and develop activists	2.1. Identify potential workplace leaders or activists 2.2. Consult members to identify activities they can undertake 2.3. Obtain required resources and provide assistance to support members and activists 2.4. Identify activist ***development needs*** 2.5. Ensure appropriate ***activities*** are agreed, explained and reviewed
3. Develop networks	3.1. Identify and document ***aims of networks*** 3.2. Ensure ***networks*** are developed resourced, supported and maintained

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ELEMENT	PERFORMANCE CRITERIA
	3.3. Ensure positive relationships are developed and maintained with network members 3.4. Utilise networks to extend participants' understanding of union and social justice issues 3.5. Monitor effectiveness of networks and ***review*** against documented aims of network

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- interpersonal and consultation skills to listen effectively and to ask questions
- project planning skills.

Required knowledge

- national, state/territory legislation and regulations relating to rights and responsibilities of representatives and union members, and anti-discrimination legislation especially as it pertains to employment
- relevant employment agreements, including:
  - awards
  - other industrial instruments
  - various forms of workplace agreements
- union information, such as:
  - legal right of entry
  - history (general and workplace, location and industry-specific)
  - current policies, priorities and activities
  - recruitment policies and procedures
  - membership information (benefits, rates and process for applying)
  - representation processes.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • range of skills and techniques that have led to the empowerment of groups and individuals to advocate for social change • demonstrated evidence in developing members and potential activists to achieve defined aims and, where appropriate, how networks are built • demonstrated evidence of how workplace issues were identified including surveys, questionnaires and interview notes • knowledge of national, state/territory legislation and regulations relating to rights and responsibilities of representatives and union members, and anti-discrimination legislation especially as it pertains to employment.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace and union documents • examples from work with union members • support from union officials.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in resourcing and supporting the empowerment of union members • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of union information • review of analysis of issues • review of documentation about the aims of networks

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EVIDENCE GUIDE	
	• evaluation of identified activist development needs.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Canvassing views of members and potential members may include:	• conducting a survey or questionnaire • facilitating a meeting • interviews
Workplace issues may include:	• action or proposed action taken by management • development of a collective bargaining claim • individual or collective grievance or dispute • occupational health and safety (OHS) issue/s • proposed legislative change • union issue, e.g. freedom of association or access to union support
Analysis of issue/s may include:	• how it affects other workers • whether it is a real issue • whether it is deeply or widely felt • whether it is winnable • whether it will motivate workers
Development needs might include:	• communication skills • industrial relations processes • information about terms and conditions • public speaking skills
Activities might include:	• arranging a meeting • attending a meeting

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RANGE STATEMENT	
	• becoming a delegate • collecting and distributing information • member recruitment activities • organising a petition • talking to workers
Aims of networks might include:	• action on community issues • action on work issues • development and learning • discussion and analysis of work or industry-specific issues • mentoring, coaching and leadership development • provision of support to other members, workers, equity groups and community organisations • recruitment of members
Networks might include:	• community groups, peak bodies and other unions • other individuals • potential union members in own or other workplaces • union members/activists in own or other workplaces • workplace organising committee
Reviews might include:	• allocation of next task • analysis of outcomes • debriefings • identified further support requirements • recognition of achievement • workplace organising committee agenda

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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BSBWRK403A Communicate with workers

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to communicate effectively with workers on a one to one basis and in groups in order to move them towards union membership, involvement, collectivism and activism. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who have knowledge of unionism and industrial relations, and a commitment to advancing social justice principles. They provide leadership and guidance to workers and union members.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Build relationship with workers	1.1. Use ***effective communication techniques*** to initiate contact with workers 1.2. Ascertain ***information*** about workers and the workplace 1.3. Encourage workers to communicate between themselves 1.4. Identify ***barriers*** to union membership and activism 1.5. Undertake ***analyses of issues***
2. Motivate workers	2.1. Make ***responses*** to workers' objections 2.2. Explain the benefits of acting collectively 2.3. Use ***motivational techniques***
3. Make presentations	3.1. Plan venue and equipment for the presentation 3.2. Publicise presentation to target groups of workers 3.3. Present relevant information clearly, accurately and appropriately to the needs of the workers 3.4. Utilise appropriate ***visual aids*** to enhance the presentation 3.5. Handle workers' questions and comments appropriately during the presentation

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• work within organising frameworks • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities • group presentation skills • interpersonal skills to listen effectively and to ask questions.
Required knowledge
• awards and agreements • contemporary issues for workers • occupational health and safety • union campaigns • union enrolment procedures and costs • union rules, policies, practices and protocols • union services.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of a range of techniques that have led to increases in union membership or collective action which advances the members' causes • knowledge of union rules, policies, practices and protocols.
Context of and specific resources for assessment	Assessment must ensure: • access to equipment for making presentations • examples of one-to-one and group communication with workers

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EVIDENCE GUIDE	
	• support from union officials.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in communicating with workers and making presentations • observation of presentations • oral or written questioning to assess knowledge of awards and agreements • review of information ascertainedabout workers and the workplace • evaluation of explanations of the benefits of acting collectively • review of how presentations were publicised to target groups of workers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Effective communication techniques may include:	• active listening • building rapport • establishing own role and purpose of visit in a

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RANGE STATEMENT	
	way that interests the worker • initiating contact
Information may include:	• attitudes to the union • job roles and responsibilities • number of workers • past work experience • period of employment/average length of employment
Barriers may include:	• acceptance of status quo • cost • current attitudes to unions • disempowerment • fear • lack of critical awareness • lack of understanding of unions • past experiences • time
Analyses of issues may include:	• how it affects other workers • whether it is a real issue • whether it is deeply or widely felt • whether it will motivate the worker • whether it is winnable
Responses may include:	• answering the objections • equalising the barriers or objections • exploring the barriers or objections • recognising and acknowledging that the objection is real for that person
Motivational techniques may include:	• assisting workers to reflect on their issues • coaching and mentoring • exploring options for change • questioning workers about how they feel • responding empathically
Visual aids may include:	• computer-based presentations • flip charts and whiteboards • handouts • overhead transparencies • posters • videos

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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BSBWRK404A Promote equality of opportunity and fair treatment for all workers

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to work with diversity and to promote equality within the union and the workplace. It deals with challenging discrimination on the basis of race, sex, sexual orientation, disability, age and employment status. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who have knowledge of unionism and industrial relations, and a commitment to advancing social justice principles. They provide leadership and guidance to workers and union members.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Promote involvement of diverse groups	1.1. Identify barriers to participation in the workplace and the union for various groups, and develop strategies to overcome them 1.2. Implement strategies promoting participation in the workplace and the union 1.3. Acknowledge and respect ***choices***, ***identity and beliefs of others*** 1.4. Identify discriminatory language and behaviour, and take appropriate action to extinguish them 1.5. Challenge inappropriate or discriminatory behaviour or communications
2. Promote elimination of discrimination	2.1. Access up-to-date information on diversity policies and initiatives 2.2. Identify equal opportunity strategies and/or diversity initiatives for inclusion in agreements and policies 2.3. Advise workers on how to achieve a fair non-discriminatory work environment 2.4. Refer workers to appropriate ***sources of information and support*** where there are instances of discrimination 2.5. Evaluate effectiveness of strategies to foster equality of opportunity and to make recommendations for improvements

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ELEMENT	PERFORMANCE CRITERIA
	2.6. Encourage ***reasonable adjustments*** to workplaces, equipment and procedures
3. Access and review policies to promote equality and fair treatment	3.1. Access relevant policies 3.2. Review and update policies to take account of diversity and to promote equality and fair treatment 3.3. Make recommendations according to ***union procedures***

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
- negotiation skills
- self-awareness and self management skills.

Required knowledge

- composition of the workforce, including:
  - age
  - gender
  - cultural background
- relevant legislation, codes of practice and national standards in the areas of sexual harassment, equal opportunity, industrial relations and disability
- role and responsibilities of established bodies that cover discrimination, such as:
  - human rights and equal opportunity commissions/tribunals
  - industrial relations commissions/tribunals
  - disability discrimination agencies
  - national and international agencies that could provide information, such as legal advice.

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated evidence of actively working to promote equality of opportunity and representation within the workplace and the union; including reviewing policies and developing strategies to promote equality of opportunity and fair treatment for all workers • knowledge of relevant legislation, codes of practice and national standards in the areas of sexual harassment, equal opportunity, industrial relations and disability.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace and union documents • examples from work with union members • support from union officials.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in challenging discrimination • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of the roles and responsibilities of established bodies that cover discrimination • assessment of action taken to extinguish discriminatory language and behaviour • review of documentation outlining reasonable adjustments to workplaces, equipment and procedures • review of recommendations made to policies to

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EVIDENCE GUIDE	
	promote equality and fair treatment.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Choices**, **identity and beliefs of others may include:	• cultural identity • disabilities of all types • gender • history, issues and culture of Indigenous peoples • race/ethnicity • religion • sexual orientation
Sources of information and support may include:	• community advocacy organisations with specific expertise related to equity group members and issues • discrimination and equal opportunity bodies, and industrial tribunals for handling cases of discrimination • human rights and equal opportunity tribunals/commissions • industrial relations commissions/tribunals • legal advisors • senior union officials • union policies
Reasonable adjustments are:	• a requirement of legislation and government policy to ensure that all people are treated equally in their employment and training, as far

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RANGE STATEMENT	
	as is reasonably possible
Union procedures could include:	• committee structures within a union • committee structures within a workplace • informal/formal activist networks • provisions in workplace agreements, policies and memoranda or deeds • rules and regulations for seeking endorsement of union policies • workplace custom and practice

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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BSBWRK405A Promote union values, principles and policies

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to demonstrate the values of the union and social justice movements. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who have knowledge of unionism and industrial relations, and a commitment to advancing social justice principles. They provide leadership and guidance to workers and union members. This unit addresses the need for unionists to demonstrate integrity in their role. It requires recognition of the history and the political, social and economic importance of the wider trade union, political and social justice movements.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Demonstrate an understanding of union context and principles	1.1. Display conduct which demonstrates an awareness of the ***values and principles of unionism***
	1.2. Ensure a sound knowledge of the structure and processes of the union, and the union ***context*** and its history is evidenced in work
	1.3. Ensure a sound knowledge of ***organising principles***, strategies and behaviours is evidenced in work
	1.4. Ensure decision making processes are democratic and accountable and can be readily explained to other union members
	1.5. Clearly communicate the rights, responsibilities and benefits of union membership
2. Promote social justice and the trade union movement	2.1. Ensure an awareness of the historical, social, political and economic importance of the union movement is evidenced in work
	2.2. Integrate ***social justice*** issues into work practices
	2.3. Utilise opportunities to explain and promote the values and principles of the union movement effectively and appropriately
	2.4. Make links between wages and conditions and

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ELEMENT	PERFORMANCE CRITERIA
	social justice and collective power 2.5. Make links with relevant social and political coalitions
3. Develop own and others' commitment to a collective and social justice agenda	3.1. Motivate people to act collectively and encourage participation in union activities, and policy and decision making forums 3.2. Promote membership participation in a collective agenda in the workplace and the community 3.3. Ensure behaviour in others that is contradictory to furthering the principles and values of collectivism is challenged appropriately 3.4. Actively communicate the perspectives and opinions of union members within the union as appropriate 3.5. Develop own commitment

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to persuasively explain the importance of social justice and the benefits offered through the union movement
- literacy skills to read and understand a range of union literature
- organising skills to see that social justice issues are integrated across all areas of work.

Required knowledge

- basic power relations in society including economic, social, gender, racial and political
- own union: its history, vision and policies, its coverage of workers and its structure and processes
- relevant political system, including the basic structure of government and how legislation is developed, and the main political parties and their platforms
- structure of the union movement including national and international union organisations, and regional and state/territory trades and labour councils.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated evidence of how the values of the union movement are applied in daily or regular work practices • knowledge of own union: its history, vision and policies, its coverage of workers and its structure and processes.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace and union documents • examples from work with union members • support from union officials.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of social justice, the history of the union movement and the workings of the Australian political system • review of documentation promoting membership participation in a collective agenda in the workplace and the community • evaluation of links made with relevant social and political coalitions.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Values and principles of unionism may include:	• collectivism • cooperation • democracy • egalitarianism • equality • fairness • internationalism • justice for working people • respect for diversity • right for all people to have a voice in society • solidarity • position that power imbalance in society can only be effectively changed through collective action
Context might include:	• economic, social and political environment • employer organisations and professional bodies • gender and racial divisions in society • legal entities • national and international peak councils • other affiliated unions • political parties • power relationships in society • regional and state/territory trades and labour councils • relevant networks and committees
Organising principles might include:	• campaigning around issues and collective bargaining • developing networks • growth • leadership development

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RANGE STATEMENT	
	• member activism and involvement • recognising strength comes from active participation of members who own the union
Social justice might include:	• democracy • equity • fairness • human rights • inclusively

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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BSBWRK406A Participate in the bargaining process

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively participate in the process of bargaining to establish collective agreements that maintain and promote rights and conditions for union members. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who have knowledge of unionism and industrial relations, and a commitment to advancing social justice principles. They provide leadership and guidance to workers and union members. Individuals who perform this task of bargaining will be generally working with union staff in advocating members' interests in the development of collective agreements.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop and promote a bargaining agenda and environment	1.1. Implement organising strategies to build membership, involvement and power in the workplace 1.2. Explain steps in bargaining ***an agreement*** to members 1.3. Discuss merits and benefits of bargaining 1.4. Consult members in defining a bargaining agenda 1.5. Ensure initial claims or content for a new agreement are discussed and agreed with members
2. Involve membership in bargaining processes	2.1. Plan activities that involve membership in support of union claims 2.2. Support members in ***workplace activities*** 2.3. Advise members of employer's response and provide members with opportunities to comment and provide input 2.4. Obtain final approval from union and membership or recommence negotiations or withdraw from

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ELEMENT	PERFORMANCE CRITERIA
	bargaining process
3. Implement agreement	3.1. Provide members with feedback on final outcomes and/or access to final copies of the agreement 3.2. Evaluate bargaining campaign and set processes in place to monitor implementation of the agreement 3.3. Check the workplace for compliance with the agreement

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to consult with union members and to ensure agreement and support for planned actions and strategies • democratic decision making skills • organising skills to prepare for and implement an effective bargaining process • innovation skills to find meaningful ways to deal with a wide range of member issues.
Required knowledge
• bargaining theory and practices • legislative framework for the bargaining process • relevant policies and procedures • relevant precedents and previous decisions.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • proposed agreement with accompanying documentation and/or explanation of how union members were involved in the process, how the agreement was presented to the employer and what their response was, and how bargaining was practiced to achieve endorsement and support for the outcome • critical evaluation of the bargaining process and how it could be enhanced • knowledge of bargaining theory and practices.
Context of and specific resources for assessment	Assessment must ensure: • actual or proposed agreement and accompanying documents used to plan for the agreement and present it to the employer • documents developed in the course of the bargaining process.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of activities planned to involve membership in support of union claims • review of feedback provided to members on final outcomes and/or access provided for members to final copies of the agreement.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different

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RANGE STATEMENT	
work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
An agreement may include:	• agreements around specific issues such as hours of work, breaks, rosters, treatment of workers and access to training • workplace agreements
Workplace activities may include:	• protected industrial action • surveys and petitions • union newsletters and memos • workplace or other meetings

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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BSBWRK407A Provide advice to union members

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively provide advice to union members about their industrial and employment rights. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who have knowledge of unionism and industrial relations, and a commitment to advancing social justice principles. They provide leadership and guidance to workers and union members.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify information about members' rights	1.1. Select and utilise ***appropriate methods*** for gathering information from members 1.2. Gather information from members in a sensitive way 1.3. Identify and access ***sources of information*** which impact on a member's rights 1.4. Utilise ***effective communication techniques***
2. Interpret information about members' rights	2.1. Interpret information within a legal, industrial and workplace context 2.2. Take account of relevant precedents, the member's expectations, and relevant cultural factors such as gender, ethnicity or the workplace 2.3. Seek union clarification of information if necessary
3. Provide information, advice and support to members	3.1. Provide members with accurate information 3.2. Identify options and recommend action in accordance with union policies and procedures 3.3. Identify ***opportunities to involve other members***/employees in the issue 3.4. Make referrals to ***specialist services*** where appropriate

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytical and research skills to gather and utilise information about legislation, awards, agreements and other relevant industrial instruments • culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities.
Required knowledge
• common law rights and obligations • decisions and actions of regional, national and international union bodies or other unions • national, state/territory legislation relating to industrial relations, vocational education and training, occupational health and safety (OHS), discrimination and equal employment opportunity • precedents for similar issues/matters • relevant employment agreements, awards and terms, and conditions of employment • union policies and procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of a range of examples where union members have been provided with accurate information about the union, relevant legislation, awards and worker entitlements • knowledge of relevant employment agreements, awards and terms, and conditions of employment.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace and union documents

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EVIDENCE GUIDE	
	• examples from work with union members • support from union officials.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in speaking to workers about union matters • observation of presentations • oral or written questioning to assess knowledge of decisions and actions of regional, national and international union bodies or other unions • review of methods used to gather information from members • review of information provided to members.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Appropriate methods may include:	• documents and other information • interviews in the workplace or elsewhere • surveys • workplace organising committee meetings
Sources of information may	• awards, agreements, legislation or common

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RANGE STATEMENT	
include:	law • grievances or disputes process • union and workplace policies • workplace precedents
Effective communication techniques refers to:	• active listening • analysing and summarising • body language • interpersonal and language style • plain English • questioning (use of open or closed questions)
Opportunities to involve other members may include:	• attending a meeting • involvement in a workplace election • joining a workplace organising committee • participating in a workplace activity, e.g. drafting a pamphlet • participating in an OHS or other committee
Specialist services may involve:	• referral to a counselling or conciliation/mediation service • referral to a senior union officer • referral to legal counsel • relevant agency or tribunal, e.g. industrial relations tribunal

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

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Co-requisite units

Co-requisite units		

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BSBWRK408A Undertake negotiations

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively participate in negotiations either as an individual or as a member of a negotiating team. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who have knowledge of unionism and industrial relations, and a commitment to advancing social justice principles. They provide leadership and guidance to workers and union members. The unit relates to the negotiation of a range of issues for workers, such as terms and conditions of employment, awards and agreements, workplace safety and industrial matters.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Prepare for negotiations	1.1. Encourage members to raise issues and matters of concern 1.2. Analyse the presenting issue and obtain additional information from members and others, if required 1.3. Identify the ***purpose and objectives of the negotiation*** and verify the claim, including top- and bottom-line positions, in consultation with members 1.4. Identify and establish priorities for the negotiation 1.5. Undertake research to develop a position which is assessed for strengths and weaknesses, takes account of member views and is assessed against relevant policies 1.6. Identify main arguments, predict opponent's arguments and consider consequences of not reaching agreement 1.7. Select a ***negotiation style*** and make decisions on how to present the position

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ELEMENT	PERFORMANCE CRITERIA
2. Participate in negotiations	2.1. Assign roles for negotiators, fully brief all participants and gain support from all relevant parties for an agreed approach to the negotiations 2.2. Clearly state relevant facts to the issue presented in the negotiation and explain the strength of the agreed position 2.3. Identify ***relevant precedents*** and supporting arguments 2.4. Identify all negotiating positions and alternative offers 2.5. Utilise effective communication techniques and ***techniques for dealing with conflict and deadlocks*** 2.6. Monitor discussions, take notes and fully explore options consistent with objectives/policies 2.7. Seek adjournments where appropriate and take time to consult with others where required 2.8. Confirm agreed position or outcome in writing
3. Finalise and monitor outcomes of negotiations	3.1. Confirm agreement with the relevant authority, document the agreement and file appropriately 3.2. Report to members on outcomes of the negotiations 3.3. Put mechanisms in place to ensure agreement is implemented and implementation is monitored 3.4. Debrief negotiating participants and take follow-up action if required 3.5. Evaluate effectiveness of negotiation against objectives and relevant policies

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- analytical and research skills to ensure proper preparation for negotiations
- communication skills to negotiate effectively
- innovation skills to find meaningful ways to deal with a wide range of member issues
- problem-solving skills to find ways to deal with blocks to negotiation.

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge
• common law rights and obligations • decisions and actions of regional, national and international union organisations and councils • precedents for similar issues/matters • relevant employment agreements, awards and terms, and conditions of employment • relevant legislation relating to industrial relations, vocational education and training, occupational health and safety, discrimination and equal employment opportunity • relevant policies and procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of negotiations on a range of industrial and other relevant issues, with various stakeholders • preparation of relevant documents to support effective negotiations • knowledge of precedents for similar issues/matters.
Context of and specific resources for assessment	Assessment must ensure: • access to a range of scenarios relevant to the work of the candidate • suitable environment for re-enacting negotiations.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate

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EVIDENCE GUIDE	
	• observation of demonstrated techniques in negotiation • observation of performance in role plays • observation of presentations • oral or written questioning to assess knowledge of relevant policies and procedures • review of position developed for the negotiation • review of notes taken and options explored during the negotiation • evaluation of reports to members on outcomes of the negotiations.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Purpose and objectives of the negotiation may relate to:	• awards and agreements • roles and responsibilities • settlement of claims • skills and training issues • terms and conditions of a contract • terms and conditions of employment • workplace health and safety issues
Negotiation style may be:	• assertive • collaborative • competitive • subordinate
Relevant precedents could	• industrial or legal decision/s and interpretations

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RANGE STATEMENT	
include:	• issues at common law • other workplace/industry disputes and agreements • statutory and industrial rights and conditions
Effective communication techniques refers to:	• active listening • body language • interpersonal and language style • questioning (use of open or closed questions)
Techniques for dealing with conflict and deadlocks may include:	• calling in a third party • clarifying the position of both parties • notifying and undertaking industrial action • preparing a compromise or alternate position • referring back and consulting with members • restating or reframing the position

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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BSBWRK409A Prepare for and participate in dispute resolution

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to prepare for and participate in a dispute resolution process including a dispute over the application of terms and conditions of employment or bargaining. It covers preparation of a case, participation in a dispute resolution process and the process of appearing before a tribunal or body to assist in the resolution of the dispute. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who have knowledge of unionism and industrial relations, and a commitment to advancing social justice principles. They provide leadership and guidance to workers and union members. Individuals who perform this task of dispute resolution will be generally working with union staff.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Prepare for dispute resolution	1.1. Establish facts and issues surrounding the ***dispute*** 1.2. Analyse key strengths and weaknesses of own and opposing case 1.3. Determine and analyse ***dispute resolution process*** to be applied 1.4. Identify ***evidence*** that can be used to support own case 1.5. Make an assessment of realistic outcomes that may be achieved and agree on objectives for participating in the processes 1.6. Develop an appropriate strategy to deal with the dispute through agreed or established processes 1.7. File appropriate documentation in accordance with the agreed procedure and/or tribunal requirements
2. Participate in dispute	2.1. Present an outline of position to support own case

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ELEMENT	PERFORMANCE CRITERIA
resolution processes	and respond to and/or rebut opposing arguments 2.2. Identify common areas of agreement, seek to minimise areas of disagreement and achieve an outcome that will align with your objective/s
3. Reach an outcome to dispute resolution	3.1. Use ***communication techniques*** to put forward options for resolution of the dispute 3.2. Seek agreement on identified options that are consistent with own objectives 3.3. Consult with appropriate parties over authority to reach agreement on particular options 3.4. Refer to appropriate tribunal/person in accordance with the dispute resolution process where agreement cannot be reached 3.5. Clarify agreement or withdraw from dispute resolution process
4. Evaluate and review outcome against objectives	4.1. Report back to members and union on outcomes 4.2. Review outcome with members and union against objectives 4.3. Review dispute resolution processes for effectiveness

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• analytic skills to determine relevant facts and issues surrounding the dispute • communication skills to obtain information from relevant parties and to attain agreement • literacy skills to read reports and to prepare appropriate documentation • teamwork skills to work with others effectively.
Required knowledge
• common law rights and obligations • precedents for similar issues/matters • relevant policies and procedures • relevant employment agreements, awards and terms, and conditions of employment

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REQUIRED SKILLS AND KNOWLEDGE
• relevant legislation relating to industrial relations, vocational education and training, occupational health and safety, discrimination and equal employment opportunity.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documented case relating to an individual grievance, workplace dispute or related matter, with supporting evidence of how facts were gathered and analysed, and the process that occurred to achieve a resolution • analysis of the roles of the parties involved in the dispute and the effectiveness of strategies used in the dispute resolution • knowledge of common law rights and obligations.
Context of and specific resources for assessment	Assessment must ensure: • access to a range of documents relating to a dispute.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • assessment of analysis of key strengths and weaknesses of own and opposing case • review of documentation outlining position to support own case and responding to and/or rebutting opposing arguments • review of how outcomes were reported back to members and union.

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EVIDENCE GUIDE	
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Dispute may relate to:	• bargaining dispute • grievance under an award or agreement • term of legislation, award or agreement
Dispute resolution processes may include:	• agreed dispute resolution processes • dispute resolution processes in workplace agreements • model dispute resolution processes
Evidence may include:	• custom and practice • documented interviews • precedents • relevant policies • statements
Communication techniques may include:	• active and involved listening, reframing, summarising, reflecting, clarifying, paraphrasing • body language • interpersonal and language style • problem solving • questioning (use of open or closed questions)

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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BSBWRK410A Implement industrial relations procedures

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to work with industrial relations policies and procedures. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit addresses the knowledge and skills required to represent the organisation/employer in dealing with industrial relations matters in the workplace. The unit covers communicating and implementing industrial relations policies and procedures that meet statutory and legislative requirements; assisting in dealing with industrial relations conflicts and issues; and generally working towards a harmonious industrial relations climate within the workplace.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Communicate and implement organisation's industrial relations policies and procedures	1.1. Source and disseminate ***relevant legislation***, ***agreements***, ***policies and procedures*** to all relevant ***persons and groups*** 1.2. Implement agreements, policies and procedures in accordance with ***site***, ***enterprise and statutory requirements*** 1.3. Develop strategies to effectively communicate with relevant persons and groups on industrial relations matters 1.4. Promote the organisation's industrial relations procedures to relevant persons and groups 1.5. Represent the organisation appropriately in discussions with key stakeholders
2. Assist in minimising industrial relations conflict	2.1. Monitor the implementation of industrial relations policies and procedures 2.2. Process and report to ***management*** on potential industrial relations conflicts

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Prepare and forward documentation to management and other relevant parties about potential industrial relations conflicts 2.4. Work in conjunction with managers to contain industrial relations conflicts 2.5. Work with employees to resolve personal grievances and to prevent escalation of industrial relations conflicts
3. Enhance industrial relations	3.1. Trial and implement strategies to monitor the implementation of the organisation's industrial relations policies and procedures 3.2. Implement strategies to facilitate feedback on the industrial climate 3.3. Implement strategies to strengthen relationships with relevant persons and groups 3.4. Provide information and feedback to management on industrial relations 3.5. Provide information and advice to relevant persons and groups

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy and verbal communication skills to present information in clear and accessible ways to relevant persons • negotiation and conflict resolution skills to deal with sensitive information and resolve issues.
Required knowledge

• grievance resolution policy and procedures
• industrial relations policies and procedures, such as:
  • enterprise agreements
  • enterprise and workplace bargaining
  • role of employee representatives and employee organisations
• legislation, codes of practice and national standards, for example:

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REQUIRED SKILLS AND KNOWLEDGE
• equal employment opportunity (EEO), anti-discrimination • international industrial relations systems where work undertaken has an international focus or context • occupational health and safety (OHS) • relevant state/territory and federal industrial relations systems.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated experience in working with legislation, awards and agreements to provide written and verbal advice in industrial matters • knowledge of relevant legislation, codes of practice and national standards.
Context of and specific resources for assessment	Assessment must ensure: • access to a range of workplace documentation relating to current industrial matters.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports/examples of industrial conflict that has been resolved • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in providing advice about industrial matters • observation of performance in role plays • observation of presentations

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EVIDENCE GUIDE	
	• oral or written questioning to assess knowledge of industrial relations legislations and current issues • review of documentation promoting the organisation's industrial relations procedures • review of documentation prepared about potential industrial relations conflicts.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Certificate IV in Human Resources.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant legislation, ***agreements***, ***policies and procedures*** include:	• EEO, diversity, parental leave policies • employment contracts • enterprise agreements and workplace agreements • industrial awards, orders and decisions • industrial relations legislation • OHS policies and procedures • reasonable adjustments for workers with a disability
Persons and groups include:	• employee representatives • employer representatives • union representatives
Site, ***enterprise and statutory requirements*** refer to:	• award and enterprise agreements, and relevant industrial instruments • dispute settlement procedures • grievance mechanisms • relevant industry codes of practice

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RANGE STATEMENT	
	• relevant legislation from all levels of government that affects business operation, especially in regard to OHS and environmental issues, equal opportunity, industrial relations and anti-discrimination • reporting channels and procedures
Management may include:	• chief executive officer, Board and other senior managers • industrial relations/human resources manager • line managers

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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BSBWRK501A Develop, manage and review campaigns and projects

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively plan, manage and review union campaigns or projects. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a sound theoretical knowledge base in unionism and industrial relations who provide leadership to members and staff in the union workplace. The union campaigns and projects may relate to a range of issues such as campaigns to target public opinion, campaigns on industrial issues, or projects to increase membership.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan campaigns and projects	1.1. Undertake research to establish issues and requirements for the ***campaign or project***
	1.2. Establish ***steering committee***, if appropriate, with terms of reference
	1.3. Establish and agree upon objectives and outcomes with stakeholders
	1.4. Establish and identify decision-makers and points of influence to support the campaign
	1.5. Develop and communicate an ***action plan***
	1.6. Identify key indicators, milestones and measures and put evaluation techniques in place to monitor progress
	1.7. Disseminate communication and monitoring mechanisms
	1.8. Allocate ***resources*** and establish systems for recording and maintaining records
2. Manage campaigns and projects	2.1. Select relevant people to be involved on the basis of interest and suitable skill sets, and clarify roles and responsibilities
	2.2. Allocate staff time to undertake work and establish work plans with and for individual staff members

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Implement risk management strategies as required 2.4. Monitor campaign or project against plan, and negotiate and agree on adjustments with relevant people if required 2.5. Develop and support team members 2.6. Provide relevant people with feedback about their performance 2.7. Ensure meetings are convened with steering committee or work team as agreed or required
3. Manage campaign or project budget	3.1. Research cost estimates thoroughly and include contingency allowances 3.2. Prepare budget and gain approval from relevant people 3.3. Monitor expenditure against budget regularly and record accurately in accordance with union requirements 3.4. Negotiate revisions to budget as required
4. Review campaign or project	4.1. Review and measure established objectives against actual outcomes 4.2. Review budget and consider actual expenditure against allocated expenditure 4.3. Debrief project or campaign and make recommendations for future activities 4.4. Document lessons learned from the campaign or project and store appropriately for future use 4.5. Share reports on outcomes with others who may benefit from the review process

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communications skills to work with committee/s, stakeholders and staff • leadership and staff management skills to direct others, to resolve conflict, to motivate staff and to provide feedback • planning and organisational skills to meet time lines, to sequence work and to

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REQUIRED SKILLS AND KNOWLEDGE
focus on priorities.
Required knowledge

• relevant regional, national, and international legislation and regulations relating to industrial relations, occupational health and safety, vocational education and training, equal opportunity and discrimination
• financial management, including:
  • how to interpret a budget
  • how to develop a budget
• researched information about employer/s
• SWOT (strengths, weaknesses, opportunities and threats) analysis facing campaign or project
• organising frameworks
• organisational priorities, structure and processes of union/s.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documents that demonstrate evidence of having managed all stages of a real or simulated project or campaign; project or campaign plan, notes from team meetings, budget, project or campaign communications • analysis of outcomes of project or campaign and how it could have been more efficient or effective • knowledge of organising frameworks.
Context of and specific resources for assessment	Assessment must ensure: • access to a range of documents related to a union campaign or project.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples

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EVIDENCE GUIDE	
	are appropriate for this unit: • analysis of responses to case studies and scenarios • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge of organisational priorities, structure and processes of union/s • review of action plan developed for campaign or project • review of work plans established with and for individual staff members • evaluation of feedback provided to relevant people about their performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Campaigns or projects may include:	• activities that can be seen to have concrete outcomes and a defined endpoint, and which require activities that are distinct from normal day-to-day work, for example:
	  • introduce a new membership system
	  • set up a call centre
	  • delegate or staff development
	• campaigns about industry issues
	• campaigns or projects about wages and conditions

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RANGE STATEMENT	
	• delegate conference, targeted organising campaigns or projects • public awareness or media campaigns or projects
Steering committee may refer to:	• any designated group with authority in relation to the campaign or project • delegates and activists • group of organisers • group of workplace representatives • management committee • members • reference group • sub-committee • workplace organising committee
Action plan will include:	• activities • budgets • communication strategies • resource requirements • risk analysis • strategies • time lines
Resources may include:	• campaign or project staff • contractors or consultants • funds • special tools or equipment • technology

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

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Co-requisite units

Co-requisite units		

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BSBWRK502A Represent the union in key forums

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to take a lead role in representing the union and its positions on key issues. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a sound theoretical knowledge base in unionism and industrial relations who provide leadership to members and staff in the union workplace. They carry high levels of responsibility and are authorised to speak on behalf of the union.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Represent the union	1.1. Confirm authority to speak on behalf of the union 1.2. Source advice and opinions from key stakeholders and experts if and when required 1.3. Accurately cite relevant policies and positions in public communications 1.4. Utilise ***opportunities*** to promote a positive image of the union
2. Positively influence attitudes and opinions	2.1. Express issues clearly and succinctly 2.2. Ensure communication style is appropriate to audience interests and concerns 2.3. Use techniques to gain interest of audience 2.4. Ensure written and audio-visual information is accurate, well structured, easy-to-follow and engaging 2.5. Select communication channels and utilise to reach intended audience
3. Build networks to promote the union	3.1. Identify key individuals and organisations as useful to the union's objectives 3.2. Establish and maintain effective formal and informal ***networks*** for the mutual benefit of the union and other parties

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- high level communication, presentation and negotiation skills to present to audiences, to deal with the media, to generate interest and enthusiasm from an audience and to relate union issues to wider public issues
- innovation skills to find new and interesting ways to create interest in key messages
- leadership skills to inspire others and to persuade people with convincing arguments.

Required knowledge

- current affairs and politics, including:
  - broad-scale knowledge of current political issues and topics
  - awareness of the political and judicial systems
- defamation and other relevant laws
- the media, including:
  - processes for obtaining media coverage, including media protocols
  - individualswithin the media and their areas of expertise and responsibility
- the union and its policies and procedures, including:
  - structure, staffing profile, etc.
  - processes for determining policies and positions
  - content of policies
- unions, including:
  - coverage of workforce
  - history
  - principles.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	

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EVIDENCE GUIDE	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of the ability to represent the union and to put across convincing messages and arguments that are of key importance to the union in a range of forums • detailed knowledge of current industrial issues that relate to the given union, and union policies and procedures.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • examples of scenarios in key forums that require effective union representation.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • demonstration of techniques • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in public speaking • review of public communications • review of written and audio-visual information • evaluation of communication channels used to reach intended audience.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work

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RANGE STATEMENT	
situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Opportunities to promote the union may include:	• adding items to meeting agendas • appearing on television • calling in to talkback radio or being interviewed on radio • including text in journals and newsletters • speaking at forums, conferences and meetings, including peak bodies • utilising technology, links to websites, etc. • writing letters to the editor, getting articles in newspapers and using paid print advertisements
Networks may include:	• community groups • journalists and other media personnel • other unionists/unions • politicians/political parties • researchers and academics • specialist groups which have relevance to the union's industry

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBWRK503A Coordinate case preparation and research

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively coordinate and prepare cases on behalf of the union before a tribunal. It covers formulating strategies within a legal framework to achieve optimum outcomes; providing advice on cases; and undertaking research and preparing case submissions. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a sound theoretical knowledge base in unionism and industrial relations who provide leadership to members and staff in the union workplace. They carry moderate levels of responsibility and are authorised to coordinate cases before a tribunal. This activity may be undertaken with advice from legal counsel.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Work within a constitutional and legislative framework	1.1. Identify relevant court, tribunal and administrative bodies to respond to each employment-related matter 1.2. Apply knowledge of the constitutional or legislative framework to work 1.3. Consider scope of jurisdiction and industrial matters 1.4. Explain and apply practical application of key employment laws
2. Formulate strategy within the appropriate jurisdiction	2.1. Apply knowledge of the appropriate jurisdiction 2.2. Apply knowledge of employment laws to achieve best outcomes 2.3. Ensure ***strategic decisions*** are informed by an understanding of the jurisdiction's powers
3. Advise on the validity and credibility of cases	3.1. Gather relevant information with sufficient detail for an accurate evaluation to be made 3.2. Consult ***specialists*** in instances where expert interpretation or advice is required

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ELEMENT	PERFORMANCE CRITERIA
	3.3. Make judgements on the basis of clear and accurate information 3.4. Evaluate likelihood of success using valid and reliable case information 3.5. Inform interested parties of likely outcomes with a clear rationale given for anticipated results 3.6. Develop a full range of options for resolution and explain rationale for option selection 3.7. Advise interested parties of rationale and provide them with information about their options where the union will not support the case 3.8. Store relevant information accurately and securely and disclose confidential information only with the express permission of the member and only to appropriate parties
4. Prepare case submissions	4.1. Identify case objectives 4.2. Identify and assess key strengths and weaknesses, including gap areas requiring further research 4.3. Predict opposing arguments and address key points to be made 4.4. Check case regularly for its validity and likely outcomes 4.5. Prepare sufficient and appropriate rebuttal of opposing party's case or build into the submission 4.6. Prepare appropriate ***submissions*** 4.7. Ensure established procedures and time lines for submission of written material and responses are met
5. Undertake case research	5.1. Identify relevant supporting and opposing precedents and arguments 5.2. Prepare ***evidence materials*** 5.3. Identify ***key studies***, ***research and other material*** in support of the case or that support opposing arguments 5.4. Re-evaluate the case against research outcomes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• high level analytical and research skills to assess relevant information and to evaluate its usefulness in the case • planning and organisational skills to make sure that the case runs smoothly • well developed writing skills to prepare necessary documentation for the case.
Required knowledge
• academic and legal studies about employment-related matters • decisions of federal and state industrial and equal opportunity tribunals • labour market and other statistical information • relevant employment agreements and awards, and terms and conditions of employment • relevant regional, national, and international legislation and regulations relating to industrial relations, occupational health and safety (OHS), vocational education and training, and equal opportunity and discrimination • union policies and procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated experience in having coordinated case preparation and evidence relating to an actual employment-related case on behalf of the union • demonstrated ability to coordinate the preparation of a case involving a number of people, to undertake detailed analysis of research, to commission research to support the case, and to prepare overall case outlines and submissions on behalf of the union • knowledge of relevant employment agreements and awards, and terms and conditions of employment.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to a wide range of documentation relating to cases which the union may have run, or be required to run.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • assessment of written reports/examples of documented cases • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of presentations • oral or written questioning to assess knowledge of legislation covering industrial relations, OHS, environmental issues, or anti-discrimination • review of options developed for resolution and review of rationale for option selected • review of documentation predicting opposing arguments and addressing key points to be made • evaluation of evidence materials prepared.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Strategic decisions may involve:	• application for adjournments • applications for orders restraining an employer from undertaking certain activities

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RANGE STATEMENT	
	• referral of matters into conciliation • use of dispute resolution processes
Specialists may include:	• academics • economists or other recognised persons within their field • legal counsel • pre-eminent persons
Submissions may include:	• written case outline • written submissions • witness statements
Evidence materials may include:	• exhibits • inspection records • precedent decisions • witness statements • written or other records
Key studies, ***research and other material*** could include:	• commissioned research • government statistical and other reports • journal materials • publications • research articles • research reports

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units	

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Co-requisite units		

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BSBWRK504A Advocate and present cases for members

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively appear before a tribunal and advocate a key case on behalf of the member/s. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a sound theoretical knowledge base in unionism and industrial relations who provide leadership to members and staff in the union workplace. They carry high levels of responsibility and are authorised by the union to appear before a tribunal.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Utilise and promote the legal basis which underpins employment rights and conditions	1.1. Apply knowledge of employment rights and conditions in a range of jurisdictions 1.2. Ensure legislative and industrial instruments are understood and applied where appropriate 1.3. Identify non-compliance with legislative, regulatory or industrial instruments and respond appropriately
2. Use dispute resolution processes for grievances and disputes	2.1. Use dispute resolution processes to achieve outcomes 2.2. Use ***dispute resolution powers and procedures*** strategically 2.3. Use dispute resolution processes to respond effectively to employer or respondent applications 2.4. Use ***appropriate tactics*** to secure the best outcome for the case 2.5. Make realistic assessments of case proceedings and alternative options
3. Advocate case before tribunal	3.1. Seek to have powers of the tribunal applied according to rules and procedures 3.2. Apply order of submissions, including giving opening and final addresses and establishing purpose and key facts 3.3. Provide written case outlines and submissions 3.4. Employ ***appropriate techniques for addressing a***

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ELEMENT	PERFORMANCE CRITERIA
	court or tribunal strategically 3.5. Seek adjournments, where appropriate, in a timely manner 3.6. Ensure appropriate documentation is tendered in accordance with required rules and procedures 3.7. Ensure relevant decisions and precedents are referred to and distinguished appropriately 3.8. Ensure issues raised by respondents or tribunal members are addressed, neutralised or rebutted in an articulate way

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- high level communication skills to advocate and speak persuasively in formal situations
- presentation skills to outline key facts
- listening skills and negotiation skills suited to the tribunal environment
- analytical skills to assess the merits of various arguments.

Required knowledge

- relevant regional, national, and international legislation and regulations relating to industrial relations, occupational health and safety, vocational education and training, equal opportunity and discrimination
- relevant employment agreements and awards, and terms and conditions of employment
- union policies and procedures
- relevant court and tribunal etiquette, rules and procedures
- rules of evidence.

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the

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EVIDENCE GUIDE	
performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated ability to prepare for and advocate an effective case before a tribunal • demonstration of a range of dispute resolution approaches that would apply to union member grievances and disputes • knowledge of relevant court and tribunal etiquette, rules and procedures.
Context of and specific resources for assessment	Assessment must ensure: • an actual or simulated tribunal environment • access to relevant documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documented assessments of case proceedings and alternative options • demonstration of techniques • observation of demonstrated techniques in advocating a case before a tribunal • oral or written questioning to assess knowledge of legislation and industrial relations • review of written case outlines and submissions.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Dispute resolution powers and procedures may include:	• arbitration • conciliation • mediation
Appropriate tactics may involve:	• seeking adjournments to reconsider own position in light of respondent arguments/new evidence • using discovery processes to elicit further information from respondent/employer • using witnesses, including hostile witnesses, to draw out relevant evidence
Appropriate techniques for addressing a court or tribunal include:	• delivery, for example, voice, tone, rate of speech and inflection • different styles of questioning • examining witnesses • focusing attention by involving the tribunal • gestures and movements • listening • mannerisms • oral submissions • rebutting submissions or evidence • use of appropriate protocol in addressing tribunal members and other representatives • use of humour or other tactics • use of notes • verbal arguments

Unit Sector(s)

Unit sector	

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Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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BSBWRK505A Develop, implement and manage union policy

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop and implement union policy, and to manage policy implementation and review. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a sound theoretical knowledge base in unionism and industrial relations who provide leadership to members and staff in the union workplace. They carry high levels of responsibility and work at a senior level in the organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Research issues and develop options	1.1. Gain authority to undertake policy review or development 1.2. Determine and document rationale for review or development of policy 1.3. Gather and review ***relevant information*** to inform policy 1.4. Utilise mechanisms to generate policy ideas from members 1.5. Identify policy options
2. Develop policy	2.1. Ensure consultation occurs with members and other stakeholders about policy issues 2.2. Draft policy based on key issues and for consistency with union values 2.3. Undertake ***consultation*** with key stakeholders in relation to the policy 2.4. Review draft policy and where appropriate revise draft policy in light of consultations undertaken 2.5. Check policy to ensure that format and style facilitate understanding and implementation 2.6. Gain formal approval for policy in accordance with union protocols and procedures
3. Implement policy	3.1. Develop strategy to implement policy in consultation with key stakeholders

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ELEMENT	PERFORMANCE CRITERIA
	3.2. Ensure key indicators and measurements for outcomes are built into strategy 3.3. Circulate strategy through available communication channels 3.4. Designate appropriate actions to individuals and ensure all staff are trained or receive instruction in the implementation of the strategy 3.5. Establish or adapt internal systems and procedures to support strategy implementation 3.6. Ensure all relevant staff are made aware of the strategy
4. Manage policy implementation and review	4.1. Store policy for ready access 4.2. Evaluate strategy and policy regularly, and update to reflect legislative and other ***changes and developments*** 4.3. Ensure policy is referred to, implemented and applied in relevant situations

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to consult with the membership, and to network and harness support for new policy
- high level writing skills to ensure policy is clear and well written and reflects union needs
- research skills to collect and analyse information, to analyse data and to review current literature.

Required knowledge

- equal employment opportunity, equity and diversity principles
- union context, such as:
  - awards and agreements
  - existing policies and procedures
  - industry issues
  - international considerations

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REQUIRED SKILLS AND KNOWLEDGE
• membership • political position/s • relevant industrial issues • strategic direction, vision, culture and values • union structure.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • evidence of policies that have been thoroughly researched, are relevant to the union's needs, and which have been widely circulated, supported and implemented • knowledge of union context in terms of awards and agreements, and existing policies and procedures.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace and union documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of documented rationale for review or development of policy • evaluation of identified policy options • review of strategies developed to implement policy • evaluation of communication channels used to circulate strategy • demonstration of techniques.
Guidance information for	Holistic assessment with other units relevant to the

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EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended, for example: • other workplace relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant information may include:	• legislation • legislative and legal/industrial inquiries and/or reviews • opinions • other policy - both internal and external • research literature and reports • statistics and data
Consultation could include:	• discussion - both informal and formal • focus groups • forums • meeting of members • national or international agencies/bodies • other unions and/or stakeholders • surveys and questionnaires
Changes and developments could include:	• changes in government policy • changes in policies of national and international peak union bodies • changes in strategic direction • changes in the policies of other unions • economic changes • political changes

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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BSBWRK506A Coordinate research and analysis

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to coordinate and undertake major research projects on behalf of the union. It covers planning research, coordinating and undertaking the research process, managing information systems, compiling reports and evaluating the research process. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a well established, sound theoretical knowledge base in unionism and industrial relations who provide leadership to members and staff in the union workplace. They carry high levels of responsibility and work at a senior level in the organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan and implement a project plan to undertake research activities	1.1. Define and agree ***research project*** objectives and timeframes 1.2. Plan research process and implement in accordance with union policies and procedures 1.3. Ensure agreed project phases, approval and review points are implemented to accommodate all project management function requirements 1.4. Evaluate research process and report in relation to established project baselines to provide appropriate measures of performance
2. Coordinate and undertake the research process	2.1. Define information needs based on work objectives and organisational requirements 2.2. Identify and allocate appropriate resources 2.3. Allocate tasks to identified staff and gain support for the project 2.4. Develop ***strategies*** to acquire required information 2.5. Communicate the methods and aims of the research clearly 2.6. Research information in a timely and thorough way and within resource allocation 2.7. Monitor progress of research project and adjust to

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ELEMENT	PERFORMANCE CRITERIA
	respond to internal and external factors
3. Analyse information and apply the results of analysis	3.1. Ensure ***specialist data and information*** is collected, consolidated and analysed to recommend outcomes and to advise trends to senior staff 3.2. Develop appropriate analytical techniques and processes, and apply to information in order to achieve defined objectives and meet requirements 3.3. Analyse information to identify facts, issues, patterns, interrelationships and trends 3.4. Undertake all work in a timely manner and meet defined standards of the union
4. Manage information systems	4.1. Maintain ***information systems*** so that data and system integrity is guaranteed 4.2. Maintain a range of standard and complex information systems and applications in accordance with organisational standards 4.3. Integrate information in a timely and coherent manner
5. Compile reports from information analysis	5.1. Use the findings from the analysis to provide advice and to develop policies and solutions which meet organisational requirements 5.2. Ensure reporting of results from analysis of information includes predictions, assumptions and constraints 5.3. Ensure reporting of results and analysis of information is logically sequenced, concise and clear
6. Evaluate the research process	6.1. Identify and communicate criteria for evaluating the effectiveness of research project and phases 6.2. Implement and monitor key measurements to evaluate the effectiveness of research processes 6.3. Debrief all staff involved in research project on progress and outcomes 6.4. Use appropriate strategies to ensure project outcomes are used effectively

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• high level research and analytical skills • project management skills • technology skills to store data and to manage information • well developed writing skills.
Required knowledge
• regional, national and international legislation and regulations relating to industrial relations, occupational health and safety (OHS), vocational education and training, equal opportunity and discrimination, trade practices • industry knowledge • union policies and procedures.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documented research project plan, with research objectives, and the outcomes of the research project which meet the stated objectives • examples of how information and data in the union is effectively gathered and managed • knowledge of the industry/s involved in the research.
Context of and specific resources for assessment	Assessment must ensure: • access to a range of research documentation • access to systems for gathering and storing data and information.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

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EVIDENCE GUIDE	
	• direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of agreedresearch project objectives and timeframes • oral or written questioning to assess knowledge of union policies and procedures • assessment of written reports • review of strategies developed to acquire required information • evaluation of how the methods and aims of the research were communicated.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Research projects could involve:	• analysis of industry specific trends, statistics and issues • comparative national and international developments • information and analysis needed to develop a campaign, strategic plan, industry or sector plan and strategy, or to bargain effectively with employers • information and analysis to conduct a strategic comprehensive corporate or community campaign
Strategies could include:	• commissioned research • computer- or web-based research

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RANGE STATEMENT	
	• establishing expert or pre-eminent opinions • joint/collaborative work with academics, economists, social researchers, political parties, international agencies and industry groups • use of focus groups, polls and surveys
Specialist data and information could include:	• information for a specific cultural or gender perspective • information, research and data in relation to corporations and inter-related bodies and connections within an industry and the economy • labour market, industry and employment statistics and related research • OHS statistics and related research • political and community polling around specific policy issues • vocational education and training statistics and related research
Information systems may involve:	• databases and the use of spreadsheets, graphs, trend and time series, and mathematical equations

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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Co-requisite units		

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BSBWRK507A Apply strategic unionism

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to apply strategic union practices; to develop and implement appropriate union strategies that will contribute to growth; and to model unionism through leadership and individual behaviour. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a well established, sound theoretical knowledge base in unionism and industrial relations who provide leadership to members and staff in the union workplace. They carry high levels of responsibility and work at a strategic level in the organisation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify and evaluate trends and issues affecting union membership	1.1. Identify and evaluate the impact of community diversity, and differing needs and social values of ***groupings or cohorts*** within the community on building unionism 1.2. Identify ***contemporary unionism practices***, in both a national and international context 1.3. Identify and evaluate current trends for union membership within industries or industry sectors 1.4. Evaluate future trends and their impact on current union strategy 1.5. Identify and analyse worker issues that impact on recruitment and retention strategies
2. Develop strategies to build unionism	2.1. Develop core priorities for the union that address membership issues through worker involvement and empowerment, and focus on union growth 2.2. Develop ***approaches*** to foster democracy within the union and to build worker empowerment through applying principles of collectivism 2.3. Develop innovative solutions to problems or issues confronting union membership 2.4. Develop and promote ***strategies*** that help shift

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ELEMENT	PERFORMANCE CRITERIA
	workers to act collectively to increase union density and activism, and achieve fair and reasonable outcomes for workers
3. Review and evaluate union strategies to promote growth	3.1. Establish key indicators to monitor effectiveness of union strategies 3.2. Implement a ***review process*** to evaluate effectiveness of strategies 3.3. Develop recommendations to adapt union strategies where appropriate
4. Provide leadership through articulating and modelling unionism	4.1. Communicate the union's vision, values and strategic objectives to union staff, members and workers 4.2. Model leadership through demonstrating collectivism and the ***values and principles of unionism*** in own behaviour 4.3. Motivate and inspire others to demonstrate union values and engage in collectivism

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• innovation and problem solving skills to find new and creative ways to address difficulties presented by the external environment • leadership skills to persuade others of the importance of strategic planning and approaches • planning and organisation skills to ensure that the union is developing strategies to favourably position the union and its members for the future.
Required knowledge
• models for developing union vision, mission and strategic plan • models of leadership and workforce democracy • workforce trends and demographic data on the workforce.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • documentation researched, using a range of sources on current issues affecting union membership and a range of strategies to address them • examples of how the union's vision, mission values and principles have been modelled and communicated in the union • knowledge of models of leadership and workforce democracy.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace, union documents and other sources of relevant information.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of models for developing union vision, mission and strategic plan • review of documentation evaluating future trends and their impact on current union strategy • review of key indicators established to monitor effectiveness of union strategies • evaluation of recommendations developed to adapt union strategies • evaluation of how the union's vision, values and strategic objectives were communicated to union staff, members and workers.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

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EVIDENCE GUIDE	
	• other workplace relations units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Groupings or cohorts may include:	• ethnic or Indigenous persons • local communities • men and women • older people • unemployed persons • workers • young people
Contemporary unionism practices may include:	• branding or re-imaging of union • community campaigning • industry or sector campaigning • membership service or call centres • organising • political campaigning • professional use of media • seeking and applying leverage within industries or sectors
Approaches may include:	• ensuring there are democratic decision-making processes at all levels within the union • establishing workplace organising committees • holding open forums for members • involving workers in developing workplace campaigns • reviewing and changing existing union structures • surveying members for their ideas and input
Strategies may include:	• appointing growth organisers • bargaining with worker involvement

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RANGE STATEMENT	
	• creating membership service centres • delegate and activist development • developing a coalition or community of interests • developing appropriate marketing strategies • using technology • workplace or industry campaigning
Review process may include:	• consultation with workers • industry audits • membership audits • polling and surveys
Values and principles of unionism may include:	• collectivism • cooperation • democracy • egalitarianism • equality • fairness • internationalism • justice for working people • position that power imbalance in society can only be effectively changed through collective action • respect • right for people to have a voice in society • solidarity

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

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Co-requisite units

Co-requisite units		

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BSBWRK508A Manage and oversee bargaining

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to effectively manage the process of bargaining to ensure collective agreements are implemented that maintain and promote rights and conditions for union members. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a well established, sound theoretical knowledge base in unionism and industrial relations who provide leadership to members and staff in the union workplace. They carry high levels of responsibility, work at a senior level in the organisation and are authorised to coordinate bargaining processes.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare for bargaining	1.1. Analyse ***workplace structures*** to support bargaining processes 1.2. Identify ***training and development needs*** 1.3. Identify existing industrial arrangements and impact of legislation relevant to bargaining 1.4. Prepare an initial draft of claims and ensure compliance 1.5. Develop bargaining strategy and negotiating tactics which complement organising activities
2. Oversee and develop workplace organisation	2.1. Develop and implement ***methods to identify issues*** in the workplace 2.2. Establish ***consultative and communication processes*** 2.3. Develop key campaign messages 2.4. Ensure recruitment of workers is undertaken and members are moved towards activism 2.5. Inoculate members to ***possible employer strategies*** and propose union responses 2.6. Coordinate, plan and commence workplace activities
3. Undertake	3.1. Participate in formal negotiations

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ELEMENT	PERFORMANCE CRITERIA
negotiations and take action	3.2. Keep records of formal meetings and outcomes 3.3. Initiate ***action*** against employer where appropriate 3.4. Apply ***negotiating techniques*** to achieve a favourable outcome 3.5. Respond to employer positions, strategy and tactics as appropriate
4. Reach and evaluate outcomes	4.1. Finalise agreed outcomes of negotiations and document agreement 4.2. Seek approval of ***endorsement process*** with members on final agreement 4.3. Ensure agreement is lodged and ballots are conducted appropriately by the employer 4.4. Review outcomes against initial plan with members 4.5. Establish a plan for implementation of the agreement

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to consult and negotiate • leadership skills to gain the support of and motivate others • organisational and analytical skills.
Required knowledge
• industrial laws and processes to ensure that agreements are consistent with legislative requirements, including discrimination legislation, especially as it pertains to employment • relevant industry and workforce • union rules, policies, practices and protocols.

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the

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EVIDENCE GUIDE	
performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • examples of agreements and a range of supporting documents generated prior to lodgement • documented analysis of a bargaining process with descriptions and critique of bargaining strategies employed • knowledge of relevant industry and workforce.
Context of and specific resources for assessment	Assessment must ensure: • access to workplace and union documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in negotiation • observation of presentations • oral or written questioning to assess knowledge of industrial laws and processes • review of documentation about training and development needs • review of bargaining strategy and negotiating tactics • evaluation of agreement documentation • review of plan established to implement the agreement.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other workplace relations units.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Workplace structures may include:	• delegates and activists • membership numbers and union workplace density • union workplace committees or structures • workplace organising committees
Training and development needs may include:	• formal training in bargaining and other skills • information and awareness raising for all members and workers • one-to-one development in campaign skills • workplace meetings to discuss issues
Methods to identify issues may include:	• one-to-one contact with members and workers • surveys • workplace meetings to discuss issues
Consultative and communication processes may include:	• email, newsletters, union memos • one-to-one contact by delegates and activists • phone trees • regular workplace meetings • workplace organising committee meetings
Possible employer strategies may include:	• benevolence • contracting out • creating a climate of fear and hostility • creating an in-house union • non union agreements • terminating agreements
Action may include:	• petitions • protected industrial action including strikes, bans, limitations • resolutions • using the media or other bodies or groups to exert pressure or seek influence • workplace meetings
Negotiating techniques may	• changing of position

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RANGE STATEMENT	
include:	• gathering information • preparing a compromise • referring back • spiralling • taking action • using third parties
Endorsement process may include:	• ballot processes • workplace meetings of members

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

Co-requisite units

Co-requisite units		

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BSBWRK509A Manage industrial relations

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to manage industrial relations matters within an organisation, with day to day involvement. It includes strategic planning and policy development for industrial relations as well as negotiation, conflict management and dispute resolution. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals with a well established, sound theoretical knowledge base in human resources management and industrial relations who are proficient in using a range of specialised technical and managerial techniques to plan, carry out and evaluate their own work and/or the work of a team. They may or may not have responsibility for supervising the work of others but are authorised to oversee industrial relations in the organisation. However they will have knowledge of current industrial relations trends and legislation. The unit addresses staff who have responsibility for working across the organisation to ensure that there is a policy infrastructure which ensures legislative compliance and clarifies issues. It also addresses the requirement for responding to industrial conflict and grievances.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Develop industrial relations strategies/policies	1.1. Analyse strategic plans and operational plans to determine ***long-term industrial relations objectives*** 1.2. Analyse existing industrial relations performance in relation to strategic industrial relations objectives 1.3. Evaluate options in terms of ***cost benefit***, ***risk analysis*** and current legislative requirements 1.4. Establish industrial relations strategies/policies within the management team 1.5. Identify the knowledge and skills needed by management and the workforce to effectively implement these strategies/policies
2. Implement industrial	2.1. Develop an ***implementation plan*** and contingency

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ELEMENT	PERFORMANCE CRITERIA
relations strategies/policies and plans	plan for the industrial relations strategies/policies 2.2. Make arrangements for training and development in accordance with identified needs, to support the industrial relations plan 2.3. Undertake ***associated industrial relations activities*** to agree to changes required by policies or implementation plan 2.4. Ensure procedures for addressing grievances and conflict are properly documented 2.5. Communicate key issues about procedures for addressing grievances and conflict
3. Manage negotiations, conflict and disputes	3.1. Train individuals in ***conflict management techniques/procedures*** 3.2. Identify and where possible alleviate or eliminate, sources of conflict or grievance in accordance with legal requirements 3.3. Check documentation and other information sources to clarify issues in dispute 3.4. Obtain expert or specialist advice and/or refer to precedents, if required 3.5. Determine desired negotiation outcomes, negotiation strategy and negotiation timeframes 3.6. Advocate the organisation's position in negotiation to obtain agreement 3.7. Document and if necessary, ***certify*** the agreed outcomes with the relevant jurisdiction 3.8. Implement agreements 3.9. Take remedial action where groups or individuals fail to abide by agreements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to advocate, consult, negotiate and mediate conflict • innovation and problem-solving skills to manage sensitive and important issues • planning and time management skills to meet critical deadlines, to sequence tasks,

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REQUIRED SKILLS AND KNOWLEDGE
to prepare submissions and to present cases.
Required knowledge
• enterprise and workplace bargaining processes • key entities in the Australian industrial relations system, including courts and tribunals, trade unions, employer bodies • relevant industrial, occupational health and safety, equal opportunity and anti-discrimination legislation in both the Commonwealth and state jurisdictions.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstrated understanding of contemporary industrial issues and legislation • documented strategies and procedures for dealing with grievances and disputes • performance of negotiation/conflict resolution techniques • knowledge of relevant legislation.
Context of and specific resources for assessment	Assessment must ensure: • access to appropriate documentation and resources normally used in the workplace.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • assessment of written reports on industrial issues • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • observation of demonstrated techniques in negotiation and case presentation

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EVIDENCE GUIDE	
	• observation of presentations • oral or written questioning to assess knowledge of industrial relations legislation • review of documentation outlining long-term industrial relations objectives • review of implementation plan and contingency plan • evaluation of documentation communicating key issues about procedures for addressing grievances and conflict.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • other units from the Diploma of Human Resource Management.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Long-term industrial relations objectives may relate to:	• effective management of grievances, conflict situations and dispute resolution procedures • employee commitment • employee satisfaction • job design • negotiation outcomes • organisational culture • relations with unions or other peak bodies • restructuring • salary, remuneration, benefits or bonuses • workforce planning • workplace reform
Cost benefit means:	• calculation to determine whether the results/outcomes of a particular course of action are sufficient to justify the costs and

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RANGE STATEMENT	
	risks in taking that action
Risk analysis means:	• determination of the likelihood of a negative event preventing the organisation meeting its objectives and the likely consequences of such an event on organisational performance
Implementation plan may include:	• documented objectives, methodology and timeframe • project plan
Associated industrial relations activities may include:	• clarification of terms and conditions of employment of those persons affected • consultation with employee representatives including unions and elected staff representatives • ensuring the legality of proposed strategies, policies and initiatives • referring to employer representatives for advice and support
Conflict management techniques*/*procedures may include:	• controlling difficult situations using legal remedies • dispute resolution procedures • negotiating/bargaining
Certify refers to:	• Australian Workplace Agreements • workplace collective agreements

Unit Sector(s)

Unit sector	

Competency field

Competency field	Workforce Development - Workplace Relations

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Co-requisite units

Co-requisite units		

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BSBWRT301A Write simple documents

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan, draft and review a basic document before writing the final version. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are skilled operators and apply a broad range of competencies in various work contexts. They may exercise discretion and judgement to produce a range of basic workplace documentation.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan document	1.1. Determine ***audience*** and ***purpose*** for the document 1.2. Determine ***format*** and ***structure*** 1.3. Establish key points for inclusion 1.4. Identify ***organisational requirements*** 1.5. Establish ***method of communication*** 1.6. Establish ***means of communication***
2. Draft document	2.1. Develop draft document to communicate key points 2.2. Obtain and include any required additional information
3. Review document	3.1. Check draft for suitability of tone for audience, purpose, format and communication style 3.2. Check draft for readability, grammar, spelling, and sentence and paragraph construction 3.3. Check draft for sequencing and structure 3.4. Check draft to ensure it meets organisational requirements 3.5. Ensure draft is proofread, where appropriate, by supervisor or colleague
4. Write final document	4.1. Make and proofread necessary changes 4.2. Ensure document is sent to ***intended recipient*** 4.3. File copy of document in accordance with

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ELEMENT	PERFORMANCE CRITERIA
	organisational policies and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• literacy skills to read and understand a variety of texts; to prepare general information and papers according to target audience; and to proofread and edit documents to ensure clarity of meaning and conformity to organisational requirements • problem-solving skills to determine document design and production processes.
Required knowledge
• basic grammar, spelling and punctuation. • communication protocols • how audience, purpose and method of communication influence tone • organisational policies and procedures for document production • resources to assist in document production, such as dictionary, thesaurus, templates, style sheets.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • producing a range of documents that accurately convey required basic information • using formatting suitable for intended audience • knowledge of organisational policies and procedures for document production.

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EVIDENCE GUIDE	
Context of and specific resources for assessment	Assessment must ensure: • access to office equipment and resources • examples of documents.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of draft documents • analysis of responses to case studies and scenarios • demonstration of techniques • oral or written questioning to assess knowledge of communication protocols • review of final documents.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBITU303ADesign and produce text documents • other general administration units.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Audience may include:	• internal and external customers • recipient/s who receive a copy for information • primary recipient/s of the communication
Purpose may include:	• clarification of issues • communication about meetings or events • information • minutes/outcomes of meetings

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RANGE STATEMENT	
	• request for information, advice or assistance • statements of fact • straightforward advice
Format may include:	• email • forms • letters • memos • minutes of meetings • organisational templates or proformas for letters, memos or reports • tables
Structure may include:	• organisation of the material to suit the format (e.g. scannability for on-screen use) • treatment of attachments and hyperlinks • visual signposting of material, including use of headings, lists, keywords and text in boxes
Organisational requirements may include:	• house style requirements • identified authorities for signatories for correspondence/communications • protocols, both written and unwritten for the organisation's internal and external communications • requirements for inclusive and non-discriminatory language and for adherence to copyright legislation
Method of communication may include:	• inclusive communication • use of active or passive voice • use of the appropriate register or style of language - formal, standard or informal
Means of communication may include:	• software packages such as MS Word, Excel, PageMaker, PowerPoint and templates
Intended recipient may include:	• audience for document • signatory of the document • supervisor or other staff member who may add to or forward document to another recipient

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Communication - Writing

Co-requisite units

Co-requisite units		

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BSBWRT401A Write complex documents

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to plan documents, draft text, prepare final text and produce documents of some complexity. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who work in a range of business environments and are skilled in the creation of reports, information and general promotion documents that are more complex than basic correspondence, memos or forms and that require review and analysis of a range of information sources.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan documents	1.1. Determine the ***purposes*** of documents 1.2. Choose ***appropriate formats*** for documents 1.3. Establish ***means of communication*** 1.4. Determine ***requirements of documents*** 1.5. Determine ***categories and logical sequences of data***, ***information and knowledge*** to achieve document objectives 1.6. Develop overview of structure and content of documents
2. Draft text	2.1. Review and organise available data, information and knowledge according to proposed structure and content 2.2. Ensure data, information and knowledge is aggregated, interpreted and summarised to prepare text that satisfies document purposes and objectives 2.3. Include graphics as appropriate 2.4. Identify gaps in required data and information, and collect additional material from ***relevant enterprise personnel*** 2.5. Draft text according to document requirements and genre 2.6. Use language appropriate to the audience

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ELEMENT	PERFORMANCE CRITERIA
3. Prepare final text	3.1. Review draft text to ensure document objectives are achieved and requirements are met 3.2. Check grammar, spelling and style for accuracy and punctuation 3.3. Ensure draft text is approved by ***relevant*** enterprise personnel 3.4. Process text amendments as required
4. Produce document	4.1. Choose basic ***design elements*** for documents appropriate to audience and purpose 4.2. Use word processing software to apply basic design elements to text 4.3. Check documents to ensure all requirements are met

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to clarify requirements of documents
- literacy skills to edit and proofread documents; to create documents with a complex, organised structure of linked paragraphs which use simple and complex syntactic structure
- numeracy skills to collate and present data, graphs and annotated references
- problem-solving skills to use processes flexibly and interchangeably.

Required knowledge

- enterprise style guide/house style
- formatting styles and their impact on formatting, readability and appearance of documents
- organisational requirements for ergonomics, work periods and breaks, and resource conservation techniques
- rules and conventions for written English, as defined by general and specialist dictionaries and books about grammar.

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • production of documents • editing draft text to ensure accuracy and clarity of information • knowledge of enterprise style guide/house style.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace or simulated environment • access to office equipment and resources • examples of documents and style guides.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • review of structure and content of documents • review of draft documents • review of final documents • demonstration of techniques • oral or written questioning to assess knowledge of word processing software functions.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBITU401A Design and develop complex text documents.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Purposes of documents may include:	• conveying research findings • documenting policies, procedures and processes • influencing attitudes, opinions, beliefs • meeting legal requirements • meeting other data, information or knowledge needs of an audience • proposing recommendations, options and actions
Appropriate formats for documents may include:	• detailed business letters • emails • instructions and procedures • manuals • publications, leaflets, brochures • reports • speeches and presentations • submissions tender documentation and public notices • website text
Means of communication may include:	• software packages such as MS Word, MS Excel, MS PageMaker, MS PowerPoint and templates
Requirements of documents may include:	• compliance with genre • compliance with proformas, standardised reporting requirements or undertakings made by the organisation about reporting • file types and sizes for online documents • languages other than English requirements • legal or traditional requirements for the particular document format • organisational policy, procedures and guidelines applying to writing documents, including house style • point numbering systems • requirements for illustrations, photographs, graphs, charts, maps and other illustrative material

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RANGE STATEMENT	
	to explain texts • standards for references, footnotes, citations, acknowledgements • time lines, including deadlines • word length • writing styles, including simplicity of English and use of technical language
Categories and logical sequences of data, information and knowledge may include:	• arguments and rebuttals • categories and sequences traditionally used for the particular type of document being prepared • chronological, alphabetical or operating sequences • facts, observations, conclusions and recommendations • illustrative case studies and other examples • linking and summary statements • recommendations and supporting arguments
Relevant enterprise personnel may include:	• colleagues/staff in own workÂ section/ teamÂ members • consultative committees • internal providers of specialist expertise • managers/leaders/coordinators/supervisors • owners • staff in relevant work sections
Design elements may include:	• capitals and underlining • fonts • headings • illustrations, photographs and other illustrative material for design purposes • justification and alignment • lists and tables • logos, branding, organisational identity requirements • margins and paragraph indentation • page shape • page size • templates • use and amount of colour • use and amount of white space

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Unit Sector(s)

Unit sector	

Competency field

Competency field	Communication - Writing

Co-requisite units

Co-requisite units		

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BSBWRT501A Write persuasive copy

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to interpret a creative brief and evaluate a range of creative options to write persuasive copy. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to individuals who are responsible for writing persuasive copy to communicate messages in a wide range of contexts. These contexts may include television, radio, other advertising media, public relations or marketing. The unit is generally undertaken by those working in a supervisory, management or freelancing role who are primarily responsible for the development of persuasive copy. They may develop the copy individually or coordinate a team of writers.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Analyse and interpret a creative brief	1.1. Analyse and confirm the technique/s for expressing the ***central idea*** or creative concept 1.2. Identify and check the ***content*** and ***supporting information*** for accuracy and completeness 1.3. Confirm the time schedule and budgetary requirements for creating ***copy*** 1.4. Identify ***legal and ethical constraints*** impacting on copy to be developed
2. Evaluate creative options	2.1. Evaluate design and copy options against the requirements of the creative brief 2.2. Select option/s which enable the required information and image to be communicated within time and budgetary requirements
3. Prepare persuasive copy	3.1. Create original copy with impact which sets the product, service or idea being communicated apart from the competition and competitor's promotional material

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ELEMENT	PERFORMANCE CRITERIA
	3.2. Create copy which communicates the required image, features/benefits of the product, service or idea 3.3. Create copy which meets the requirements of the creative brief in terms of information, format, language, writing style, and level of detail 3.4. Produce copy on time and within budget 3.5. Produce copy which complies with legal and ethical requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to question, clarify and monitor the effectiveness of message being delivered
- creativity and innovation skills to present ideas and information in an engaging manner
- literacy skills to write high quality, persuasive copy and to communicate complex ideas and processes efficiently and effectively
- literacy skills to write in a range of styles for different audiences
- research and data collection skills to identify company and product information.

Required knowledge

- components of the creative brief
- legal and ethical requirements relating to the advertising industry
- identification and overview knowledge of key provisions of relevant legislation from all levels of government that affects business operations, codes of practice and national standards, such as:
  - anti-discrimination legislation
  - consumer protection laws
  - copyright legislation
- ethical principles
- fair trading laws
  - privacy laws
  - Trades Practices Act
- organisational and advertising budget constraints

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REQUIRED SKILLS AND KNOWLEDGE
• organisational policies, procedures, products and services • persuasive writing techniques • grammar and punctuation.

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • demonstration of effectively interpreting a creative brief to write original, innovative and persuasive copy that communicates key messages for at least one product/service or idea, on time and on budget • reasons for choosing specific design and copy options.
Context of and specific resources for assessment	Assessment must ensure: • access to an actual workplace environment • access to office equipment and resources • access to creative briefs.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • analysis of responses to case studies and scenarios • demonstration of techniques to write persuasive copy • direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate • oral or written questioning to assess knowledge of relevant legislation from all levels of government, codes of practice and national standards that impact on business operations • review of copy created.
Guidance information for	Holistic assessment with other units relevant to the

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EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended, for example: • BSBADV509A Create mass print media advertisements • BSBADV510A Create mass electronic media advertisements.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Central ideas may include:	• a combination of visual (illustration) and verbal (text and headline) messages
	• the verbal or visual device used to present the content to the reader, listener or viewer of the advertisement, such as:
	  • analogy and association
	  • case histories
	  • celebrities
	  • continuing characters
	  • demonstrations
	  • exaggerated situations
	  • fantasy
	  • photographic tricks or special effects
	  • product uses
	  • recipes
	  • slice-of-life situations
	  • testimonials

Content may include:	• the information to be communicated to the audience brand or image factors, such as:
	  • competitive advantages
	  • features of the product/service

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RANGE STATEMENT	
	• where the product may be obtained • price • colour
Supporting information may include:	• evidence to support the claimed benefit • purchasing information • reassurances for existing users • requirement to specify the target audience

Copy may include:	• the words used in broadcast advertising such as:
	  • instructions and descriptions
	  • jingles
	  • message content
	  • production and technical information
	  • program promos
	  • slogans
	  • sound sources and effects
	  • sponsorship announcements
	• the words used in print advertising such as:
	  • body copy
	  • captions
	  • display copy
	  • headlines
	  • instructions and descriptions
	  • message content
	  • overlines
	  • production and technical information
	  • subheads
	  • taglines
	  • underlines

Legal and ethical constraints may include:	• codes of practice such as those issued by:
	  • Advertising Federation of Australia
	  • Australian Communications and Media Authority
	  • Australian Competition and Consumer Commission
	  • Australian Performing Right Association
	  • Commercial Radio Australia
	  • Free TV Australia

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RANGE STATEMENT	
	• contempt of court and parliament • copyright • cultural expectations and influences • defamation • discrimination • ethical principles • obscenity • policies and guidelines • privacy and other legislation • racial vilification • regulations • social responsibilities such as protection of children, environmental issues • societal expectations

Unit Sector(s)

Unit sector	

Competency field

Competency field	Communication - Writing

Co-requisite units

Co-requisite units		

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CHCAD402D Support the interests, rights and needs of clients within duty of care requirements

Modification History

Not Applicable

Unit Descriptor

Descriptor	This unit describes the knowledge and skills required by the worker to uphold the interests and rights of clients within the organisation

Application of the Unit

Application	This unit may apply to work undertaken across a range of sectors in delivery of community services

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills	This unit contains Employability Skills

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of	The Performance Criteria specify the level of performance required to demonstrate achievement of the

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competency.	Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Provide support to client for the realisation of their *interests*, *rights* and needs within job roles and *responsibilities*	1.1 Support and encourage client to exercise their *rights* and personal preferences without compromising their safety and that of others 1.2 Appropriately inform one's supervisor, other health workers and the service about *interests*, *rights* and *needs of the client* 1.3 Identify situations of risk or potential risk and refer appropriately
2. Support and safeguard the *interests* and *rights* of clients	2.1 Make decisions and take action within the scope of *responsibilities* as specified in the job description 2.2 Properly maintain knowledge and skill required for daily activities of work 2.3 Apply work practices to minimise potential for harm to clients, self and others 2.4 Take care to behave in a lawful, reasonable and careful manner at all times

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

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REQUIRED SKILLS AND KNOWLEDGE

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include knowledge of:

- Duty of care requirements
- Common health problems and their effects
- Statements of rights, e.g. UN Charter, relevant outcomes standards documents
- Common risks to client safety
- Organisation guidelines
- Rights and responsibilities of client
- Awareness of discriminatory actions

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Demonstrate understanding of duty of care requirements
- Perform work within duty of care requirements
- Uphold and support the rights and interests of client groups in the workplace, except where contradicted by the clients' functioning and mental state

In addition, the candidate must be able to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include the ability to:

- Apply oral communication competence in order to represent the interests, rights and needs of the client to supervisor:
  - language used may be English or community language depending on the organisation
- Apply written communication skills if organisation policies and procedures require client needs to be represented in written form

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the

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EVIDENCE GUIDE

Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate this unit of competency:

- The individual being assessed must provide evidence of specified essential knowledge as well as skills
- This unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
  This may include the use of languages other than English and alternative communication systems
- Assessment may be conducted on one or more occasions but must include the normal range of workplace situations

Access and equity considerations:

- All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work
- All workers should develop their ability to work in a culturally diverse environment
- In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people
- Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities

Context of and specific resources for assessment:

- This unit can be assessed independently, however holistic assessment practice with other community services units of competency is encouraged
- Resources required for assessment include access to:
  - appropriate workplace where assessment can take place
  - simulation of realistic workplace setting for assessment

Method of assessment:

- Assessment may include observation, questioning and evidence gathered from a workplace environment
- Workplace evidence can include testimonials from

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EVIDENCE GUIDE

	colleagues or clients
Related units:	This unit of competency may be (but is not required to be) assessed in conjunction with units on communication and/or with the following related unit if they are included in qualification packaging: • CHCCS400A Work within a relevant legal and ethical framework

Range Statement

RANGE STATEMENT

The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

Appropriate representation may include:	• Meeting client needs in the context of organisation requirements • Awareness of potential conflict between client needs and organisation requirements
Interests may include:	• Possessions • Bank accounts • Accommodation • Facilities • Services available and desired • Recreational pursuits
Rights include principles expressed in:	• Charters of rights • Outcomes standards documents • General human rights and freedom from

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RANGE STATEMENT

	discrimination
Interests, rights and needs of the client may be made known by:	• Verbal representation • Written representation
Social rights of the client may include:	• Freedom of association • Friendship
Rights may be detailed in:	• In mission statements and philosophies of service provider organisations
Rights may include:	• The right of participation or non participation to the degree desired • The right to receive quality service • The right to refuse services
The needs of the client may include:	• Physical and emotional security • Support and care • Economic support • Household assistance and maintenance
Worker's responsibilities may include working within:	• Care/case plan • Job description and job role • Training received • Relevant legislation such as Poisons Act, State Nursing Acts, Podiatrists Acts, etc
Factors affecting client exercising rights may include:	• Person's culture • Another language • Gender relationships • Different emphasis on time and work • Different views of personal space and touch • Different beliefs on the community and family • Individual religious beliefs

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RANGE STATEMENT

Legal rights of the client may include:	• Rights of common law • Rights outlined under relevant outcomes standards • Rights under the constitution • Rights under legislation

Unit Sector(s)

Not Applicable

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CHCCS405C Identify and address specific client needs

Modification History

Not Applicable

Unit Descriptor

Descriptor	This unit describes the knowledge and skills required to establish the first point of contact between the client and the organisation/service It will involve collecting routine information from clients to enable a matching of services to meet their needs

Application of the Unit

Application	This unit may apply to service delivery in a range of community service contexts

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills	This unit contains Employability Skills

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Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish and maintain an appropriate relationship with *clients*	1.1 Employ appropriate language and interpersonal skills to establish rapport with clients 1.2 Ensure interactions with clients are in accordance with *organisation's standards and procedures* 1.3 Conduct *interviews* and interact with clients in a manner that promotes positive client participation 1.4 *Introduce self* appropriately 1.5 Demonstrate courtesy towards the client 1.6 In all dealings with the client, aim to generate a trusting relationship 1.7 Demonstrate respect for the *individual differences* of the client 1.8 Support the client's own interests, *rights* and decision-making 1.9 Maintain confidentiality and privacy of client within organisation guidelines 1.10 Take part in *short interpersonal exchanges* with client to establish, maintain and develop relationships
2. Extract and analyse information about *client needs*	2.1 Apply organisation mechanisms to identify and assess client needs 2.2 Collect information on relevant environmental issues affecting clients and utilise in assessment 2.3 Ensure decisions about the matching of services to client needs are based on up to date information

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ELEMENT	PERFORMANCE CRITERIA
3. Match services to client needs	3.1 Identify services from within the organisation to match client needs 3.2 Where client needs are complex or there are issues outside the area of responsibility, seek immediate support and make appropriate referrals according to organisation procedures 3.3 Provide clients with relevant information about the services available to them, in a timely manner 3.4 Working within own scope of responsibility, ensure clients have access to services that meet their needs 3.5 Ensure all advice to clients about available services is consistent with current relevant, legislative and statutory framework and the practices of the organisation 3.6 Undertake appropriate record-keeping and reporting in accordance with defined procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include knowledge of:

- Legislative requirements and provisions relevant to area of service delivery and delegated responsibility
- Organisation procedures, protocols and practice for client assessment and allocation of services

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REQUIRED SKILLS AND KNOWLEDGE

- Relevant assessment instruments

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Administer the organisation's instruments and information gathering mechanisms to assess client needs and their eligibility for specific services
- Conduct an assessment interview within defined area of responsibility
- Select an appropriate service from a range provided by the organisation to match to client needs

In addition, the candidate must be able to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include the ability to:

- Demonstrate oral communication skills required to fulfil the job role in the organisation/service
  - oral communication skills may include listening, asking questions, providing encouragement
  - language used may be English, sign language or community language depending on client group
- Demonstrate literacy competence required to fulfil the procedures of the organisation/service
  - language used may be English or community language depending on the service/ organisation

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment

- The individual being assessed must provide evidence

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EVIDENCE GUIDE

and evidence required to demonstrate this unit of competency:	of specified essential knowledge as well as skills • This unit is most appropriately assessed in the workplace or in a simulated workplace setting under the normal range of workplace conditions • Assessment must include clients with a range of different needs
Access and equity considerations:	• All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work • All workers should develop their ability to work in a culturally diverse environment • In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people • Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities
Context of and specific resources for assessment:	• This unit can be assessed independently, however holistic assessment practice with other community services units of competency is encouraged • Resources required for assessment include access to relevant workplace or simulated realistic workplace setting where assessment may take place
Method of assessment:	• Assessment may include observations, questioning or evidence gathered from the workplace e.g. testimonials from clients or colleagues, completed client records etc.

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Range Statement

RANGE STATEMENT

The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

Introduce self may need to involve consideration of the following:	• Cultural background of client • Customs familiar to client • Any physical, cognitive or mental problems which may hinder communication, such as deafness, dementia, acquired brain injury
Individual differences may be:	• Culture • Age • Economic • Social • Gender • Physical • Emotional • Intellectual • Cognitive • Language • Spiritual
Rights may be detailed in:	• Service/outcomes standards documents • Legislation • Organisation policies and practices
Short interpersonal exchanges will be appropriate to the cultural and individual differences of the client and may include:	• Chatting in friendly manner • Inquiring about the client's health • Short casual exchanges
Client needs may include:	• Physical, sexual, physical and emotional support and care

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RANGE STATEMENT

	• Financial • Household assistance and maintenance • Religious • Cultural • Spiritual • Ceremonial • Recreational • Social • Housing
Assistance may include:	• Providing information and advice • Accompanying or providing specific services • Encouragement and support for decisions and actions
Clients may include:	• Individual members of the public • Referred or self referred • People with specific needs seeking access to services • Family members and significant others
Organisation's standards and procedures include those relating to:	• Duty of care • Client interviews and client/staff relationships • Administration of questionnaires and other testing instruments and checklists • Completion of forms and applications
Interviews cover:	• Telephone and in person • Through an interpreter or other specialist assistance • Scheduled and impromptu
Client information includes:	• Personal and confidential information provided by the client and/or referring agency/person • Client feedback data • Internal organisation information resulting from meetings and assessment panels
Client services include:	• Income support (including disability, aged and sole

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RANGE STATEMENT

	parent support) • Financial and community support services • Training and employment services • Recreational activities • Care and support • Transport and communication • Referrals to specialist services • Referrals to community support and/or education groups • Community participation
Accepted organisation procedures and practice include those related to:	• Collection and storage of information • Client interview protocols and procedures • Client communication protocols • Assessment for eligibility to access particular services
Work undertaken includes:	• Accessing and providing information about services available from within, and outside the organisation • Assistance in completing forms e.g. Applications, and other written materials/submissions • Assistance in seeking access to specific services • Establishing contact with appropriate people to provide support to clients • Setting up meetings and interviews for clients • Acting as spokesperson, as required, for clients

Unit Sector(s)

Not Applicable

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CHCCS407B Operate referral procedures

Modification History

Not Applicable

Unit Descriptor

Descriptor	This unit describes the knowledge and skills required to confirm the needs of clients, advise them of referral options and arrange the referral

Application of the Unit

Application	The support may be provided in a one to one service delivery mode or in a group

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills	This unit contains Employability Skills

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.	The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range

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Statement.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Confirm client needs	1.1 Discuss client *presenting needs* with the client 1.2 Confirm client history and records 1.3 Document client's *service expectations* 1.4 Develop a plan of action is confirm with the client
2. Advise on referral options	2.1 Outline services to assist the client 2.2 Discuss *process of referral* with the client 2.3 Outline client's responsibilities and any conditions
3. Arrange referral	3.1 Clarify timeframes and procedures for accessing services 3.2 Follow referral procedures with all providers 3.3 Inform clients of progress towards meeting agreed service expectation and *plan of action* 3.4 Communicate to service provider and client, processes to review and manage service provision

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

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REQUIRED SKILLS AND KNOWLEDGE

Essential knowledge:

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include knowledge of:

- Available services and constraints on delivery
- The broader service delivery and training networks in the local area
- Process of referral and documentation of the referral

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Identify presenting needs and respond appropriately within the guidelines of the service
- Interpret and apply relevant policies
- Demonstrate application of skills in:
  - appropriate one to one communication process
  - record-keeping and documentation processes, including effective use of relevant information technology in line with occupational health and safety (OHS) guidelines

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate this unit of competency:	• The individual being assessed must provide evidence of specified essential knowledge as well as skills • Evidence must include observation of performance in the work environment or in a simulated work setting • Evidence must include demonstration over a period of time to ensure consistency of performance

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EVIDENCE GUIDE

Access and equity considerations:	• All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work • All workers should develop their ability to work in a culturally diverse environment • In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people • Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities

Context of and specific resources for assessment:	• This unit can be delivered and assessed independently, however holistic assessment practice with other community services units of competency is encouraged
	• Resource requirements for assessment include access to:
	  • an appropriate workplace where assessment can be conducted or simulation of realistic workplace setting for assessment
	  • equipment and resources normally used in the workplace

Method of assessment may include:	• Observations • Questioning • Evidence gathered from the workplace environment

Range Statement

RANGE STATEMENT

The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Add any essential operating

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RANGE STATEMENT

conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

Presenting needs refers to:	• Those readily observable or easily communicated needs prior to any counselling service Examples include: • unemployment • lack of benefit payment • difficulty in communicating • cognitive impairment • financial difficulties
Service expectations refers to:	• The type of assistance the client considers they require and includes a comment on urgency and breadth of the requirement.
Process of referral may:	• Differ between agencies, however in the context of this unit it is implied that there is a formal process which is applied and communicated
Plan of action refers to:	• The agreed responsibilities and actions to support the client move towards increased interaction and engagement with the community

Unit Sector(s)

Not Applicable

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CHCCS412D Deliver and develop client services

Modification History

Not Applicable

Unit Descriptor

Descriptor	This unit describes the knowledge and skills required to meet the specific needs of a broad range of existing and new clients within a defined framework

Application of the Unit

Application	This unit may apply in a range of community service contexts

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills	This unit contains Employability Skills

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of	The Performance Criteria specify the level of performance required to demonstrate achievement of the

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competency.	Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Target *client services*	1.1 In identifying and assessing client needs, give due consideration to individual rights, relevant community requirements and the organisation statutory and legislative environment 1.2 Establish and maintain client profiles in accordance with organisation and legislative requirements and use to monitor delivery of appropriate services 1.3 Develop client service delivery plan to address client needs and rights, including aims and objectives, resourcing implications, evaluation strategies and contingency plans 1.4 Identify and select appropriate client service to meet client needs within the scope of area of responsibility 1.5 Implement a range of mechanisms to ensure regular client service feedback is sought to gauge levels of satisfaction 1.6 Record and analyse client service feedback and report to appropriate personnel to ensure any problems are resolved and improvements implemented 1.7 Where client data and profiles indicate inability of the organisation to meet client needs, redesign services or refer *clients* to another organisation as required
2. Deliver client service	2.1 Ensure dealings with clients are consistent with their needs and rights, with accepted practice and codes of conduct of the organisation and duty of care responsibilities 2.2 Ensure service delivered to clients upholds relevant statutory and legislative requirements, the reputation of the organisation and the area of work 2.3 Base client service delivery on accurate and up to date information about client, service options and the

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ELEMENT	PERFORMANCE CRITERIA
	service being delivered 2.4 Complete and maintain all appropriate documentation related to client service delivery according to organisation standards 2.5 Implement strategies to ensure client services are routinely reviewed in the light of client needs and rights and organisation policies and capabilities, and implement remedial action as appropriate
3. Develop and promote client services	3.1 Promote the service delivery of the organisation wherever opportunities arise 3.2 Promote services to existing and/or potential clients to ensure that the details of the full range of services are understood 3.3 Develop, document and promote a range of service options for clients to facilitate informed client access to services 3.4 Assist clients to identify their needs and rights and select the best available service

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include knowledge of:

- Principles of effective client service delivery

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REQUIRED SKILLS AND KNOWLEDGE

- Organisation specific client services provided
- Promotion and marketing of services
- Service delivery skills

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Establish and maintain a network of service providers
- Incorporate the requirements of all groups in client service delivery
- Demonstrate responsiveness to client needs

In addition, the candidate must be able to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include the ability to:

- Apply oral communication skills required to fulfil the job role in the organisation/service:
  - oral communication skills may include listening, asking questions, providing encouragement
  - language used may be English, sign language or community language depending on client group
- Apply literacy competence required to fulfil the procedures of the organisation/service:
  - language used may be English or community language depending on the service/ organisation
- Utilise relevant information technology effectively in line with occupational health and safety (OHS) guidelines

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

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EVIDENCE GUIDE

Critical aspects for assessment and evidence required to demonstrate this unit of competency:	• The individual being assessed must provide evidence of specified essential knowledge as well as skills • This unit is most appropriately assessed in the workplace or in a simulated workplace setting under the normal range of workplace conditions • Assessment must include assessment of competency in dealing with a range of existing and new clients
Access and equity considerations:	• All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work • All workers should develop their ability to work in a culturally diverse environment • In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people • Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities
Context of and specific resources for assessment:	• This unit can be assessed independently, however holistic assessment practice with other community services units of competency is encouraged • Resources required for assessment include access to relevant workplace or simulated realistic workplace setting where assessment may take place
Method of assessment:	• Assessment may include observations, questioning or evidence gathered from the workplace e.g. testimonial from clients and colleagues, promotional material etc.

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Range Statement

RANGE STATEMENT

The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

Client services are:	• Specific to the organisation
Clients may include:	• Self referral or referred • Individual members of the public • Other organisations, community groups and individuals • Other work areas of the organisation • Senior management
Special client needs could relate to:	• Disabilities • Language • Gender • Culture • Age • Location

Unit Sector(s)

Not Applicable

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CHCINF505C Meet statutory and organisation information requirements

Modification History

Not Applicable

Unit Descriptor

Descriptor	This unit describes the knowledge and skills required to ensure effectiveness and efficiency of the organisation's information system

Application of the Unit

Application	This unit may apply to work in a range of community service contexts

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills	This unit contains Employability Skills

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of	The Performance Criteria specify the level of performance required to demonstrate achievement of the

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competency.	Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. *Identify information requirements*	1.1 Identify information requirements in relation to organisation and worker goals, objectives and expected outcomes 1.2 Collect, analyse and prepare data on information needs in ways to inform decision-making
2. Review options for systems to obtain information	2.1 Identify and periodically evaluate sources of information 2.2 Identify, evaluate and prepare options for information systems so users can contribute to their development 2.3 Identify and evaluate *financial and technological resources* required for systems
3. Establish and manage systems to record and store information	3.1 Periodically re-evaluate methods used to record and store information for effectiveness, efficiency, security and integrity and introduce new methods as necessary 3.2 Analyse any substantial breakdowns in methods of recording, storing and accessing information for cause and effect, and take corrective action 3.3 Establish and implement systems to ensure availability of information especially for direct use of clients 3.4 Monitor validity and usefulness of information and take appropriate actions for disposal or storage
4. Support and supervise the development of information and educational resources	4.1 Develop content and format guidelines in consultation with clients and other stakeholders, to guide production of education and information resources

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ELEMENT	PERFORMANCE CRITERIA
	4.2 Recruit appropriate expertise to develop designated information and education resources
	4.3 Establish opportunities for information users to monitor and advise on ongoing development of information and education resources
5. Provide staff training	5.1 Determine staff training needs in relation to systems for information acquisition, recording and storage, and for preparing educational resources
	5.2 Organise training or retraining in accordance with the units of competency required, training needs analysis and organisation policy

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include knowledge of:

- Application of information technology
- Workload analysis models/systems
- Operations of the agency
- Relevant policy and procedures and work systems
- Systems analysis models/theories
- Relevant legislation relating to organisation and statutory information requirements
- Range of current and emerging information technology relevant to addressing organisation information requirements

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REQUIRED SKILLS AND KNOWLEDGE

- Consultation processes and techniques
- Communication dissemination models

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Assess information requirements for an organisation or department
- Design work systems that integrate technology and address organisation and statutory information requirements
- Design training processes to support introduction of new technology in work practices
- Demonstrate knowledge of applicable agency and legislative requirements processes listed in the Range Statement

In addition, the candidate must be able to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include the ability to:

- Demonstrate application of skills in:
  - assessment of information needs
  - analysis
  - planning
  - consultation/facilitation
  - report writing
  - running reviews
  - accessing/researching current emerging technology
  - marketing technology
  - communication/dissemination strategies
- Utilise relevant information technology effectively in line with occupational health and safety (OHS) guidelines

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the

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EVIDENCE GUIDE

Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate this unit of competency:

- The individual being assessed must provide evidence of specified essential knowledge as well as skills
- This unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions
  This may include the use of languages other than English and alternative communications systems
- Assessment must include all aspects of managing the organisation's information systems in the workplace

Access and equity considerations:

- All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work
- All workers should develop their ability to work in a culturally diverse environment
- In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people
- Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities

Context of and specific resources for assessment:

- This unit can be assessed independently, however holistic assessment practice with other community services units of competency is encouraged
- Resources required for assessment of this unit include access to:
  - an appropriate workplace where assessment can be conducted or simulation of realistic workplace setting for assessment

Method of assessment:

- Assessment may include observations, questioning and evidence gathered from the workplace
  e.g. observation of recording systems, portfolios, testimonials from clients and colleagues

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EVIDENCE GUIDE

Range Statement

RANGE STATEMENT

The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

The contexts for managing information systems include:	• Management of a work unit/major program area
Managing information systems will be carried out within requirements established by:	• Commonwealth and state legislation • Organisation policy and procedures • Relevant program standards • Informal and formal arrangements with government, non-government and other service providers to obtain information relating to clients and services • Computer based recording systems • Electronic banking
Financial and technological resources required may include:	• Manual filing systems • Computerised filing software and hardware
Identify information requirements may include:	• Monitoring work output and relationship with obtaining outcomes, assessing availability of statistics to assist in monitoring workload, setting up dialogue with workers/supervisors about how to improve work practices through the use of information technology

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RANGE STATEMENT

Establishing systems to obtain information includes:	• Assessing available technology and its application to work practices • Identifying and preparing submissions for resources needed for new systems • Identifying training needs associated with implementation of new systems and either developing training to support this or investigation of possible training service providers

Unit Sector(s)

Not Applicable

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CHCORG614A Manage a community sector organisation

Modification History

Unit Descriptor

This unit describes the knowledge and skills required to plan and monitor the development direction and changes of a complex organisation, range of programs or major program area

This unit describes the knowledge and skills required to plan and monitor the development direction and changes of a complex organisation, range of programs or major program area

Application of the Unit

The skills described in this unit may be applied across a range of community services workplace contexts

The skills described in this unit may be applied across a range of community services workplace contexts

Licensing/Regulatory Information

Pre-Requisites

Employability Skills Information

This unit contains Employability Skills

This unit contains Employability Skills

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

Elements and Performance Criteria

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Element	Performance Criteria
1 Coordinate organisation planning	1.1 Identify appropriate **strategic alliances** and negotiate and maintain participation
	1.2 Identify overall purpose and philosophy of the organisation and translate into a written or recorded set of aims and objectives which are clearly understood, measurable and attainable and evaluated as appropriate
	1.3 Implement appropriate corporate planning processes that make best use of internal and external consultation processes
	1.4 Implement appropriate corporate planning processes to ensure responsiveness to client needs
	1.5 Undertake appropriate consultation with relevant people and agencies
	1.6 Establish appropriate management structure and process to coordinate corporate planning, advise decision-makers and reflect principles and philosophy of the organisation
	1.7 Analyse the way in which values and beliefs of workers and stakeholders may influence defined organisation purpose and philosophy and communicate to all relevant participants
	1.8 Make resources available as appropriate to support the planning processes at all levels
	1.9 Develop systems, processes and timeframes for all aspects and components of the planning process
2 Design and implement the structures and process of the organisation	2.1 Determine appropriate structure for the organisation to match organisation philosophy and purpose
	2.2 Develop, agree, implement and monitor lines of decision-making and accountability
	2.3 Prepare budgets in line with strategic plan and make allowance for all requirements and components of planning and implementation of programs and services

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		2.4 Establish financial accountability systems which meet agreed organisation best practice provisions
		2.5 Ensure planning guidelines provide for inclusion of appropriate statutory, legislative and practice provisions
		2.6 Develop clear, fully documented planning guidelines and systems and make them accessible to all involved
3	Implement evaluation processes	3.1 Hold appropriate consultations with stakeholders to examine issues and trends and advise decision-makers of outcomes as required
		3.2 Complete all required reporting in a timely way in accordance with organisation requirements
		3.3 Identify, develop and implement appropriate evaluation arrangements with representation from relevant stakeholder groups
		3.4 Prepare advice and provide to decision-makers within the negotiated format and timeframe
4	Enable organisation to meet legal requirements	4.1 Implement mechanisms to ensure relevant commonwealth, state and local government legal requirements are identified and adhered to
		4.2 Regularly update information about current legal requirements and if appropriate, develop proposals to modify organisation policy and procedures
5	Establish the profile of the organisation and market its services	5.1 Use formal and informal networks as channels to communicate the organisation's activities and achievements
		5.2 Use a range of communication media and activities to convey information about activities and achievements of the organisation to encourage support and interest
		5.3 Seek and utilise opportunities to promote the organisation through media, government and the community
		5.4 Display confidentiality and sensitivity in details, content and extent of public comment on organisation's activities

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6 Give direction for the effective management of the organisation	6.1 When required, develop and articulate policies and procedures for the employment role of the organisation and monitor their implementation
	6.2 Promptly address problems in implementing defined procedures to ensure resolution
	6.3 Prepare reports to comprehensively and accurately describe organisation's activities and achievements and present to relevant stakeholders and management, as required
	6.4 When required, facilitate processes of management and/or board meetings to ensure effective and informed deliberations and decision-making
	6.5 Identify and implement mechanisms for effective coordination of activities and services
7 Manage **changes in the organisation**	7.1 Identify policy, social, political and economic trends and assess their potential impact on the organisation
	7.2 Assess and revise management and work practices relative to social, political and economic trends and impacts
	7.3 Define and monitor **indicators for change** within the organisation
	7.4 Identify and promote opportunities for positive change and undertake appropriate work to maximise support from staff, clients and stakeholders

Required Skills and Knowledge

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

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The candidate must be able to demonstrate essential knowledge required to effectively perform task skills; task management skills; contingency management skills and job/role environment skills as outlined in elements and performance criteria of this unit

These include knowledge of:

Best practice including:

management systems and principles

current information technology and programs relevant to the organisation or industry

information management policies, practices and systems in the community sector

performance standards

accountability

training and skills development and recognition

administrative systems and principles

service quality development

consumer focus

enterprise agreements

performance monitoring and review

Statutory and legislative requirements including:

occupational health and safety

industrial relations/enterprise contracts

non discrimination

equal employment opportunities principles and practice

funding/service contracts/agreements

corporate affairs/incorporation/Australian Securities Commission

taxation

Essential skills:

It is critical that the candidate demonstrate the ability to:

Undertake strategic planning

Manage organisation change

Develop strategies for adapting organisation to changes

Design strategies to involve and communicate with all major stakeholders

Use information technology and software programs as required by the workplace

Coordinate the use of relevant information technology effectively to address organisation

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requirements in line with occupational health and safety (OHS) guidelines

In addition, the candidate must be able to demonstrate relevant task skills; task management skills; contingency management skills and job/role environment skills

These include the ability to:

Demonstrate application of skills in:

strategic thinking

decision-making

environmental scanning

analysis/evaluation

facilitation

high level liaison

high level oral and written communication

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate this unit of competency:	The individual being assessed must provide evidence of specified essential knowledge as well as skills This unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions This may include the use of languages other than English and alternative communication systems It is recommended that assessment take place on more than one occasion to enable all aspects of managing a service organisation to be assessed
Access and equity considerations:	All workers in community services should be

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	aware of access, equity and human rights issues in relation to their own area of work All workers should develop their ability to work in a culturally diverse environment In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities
Context of and specific resources for assessment:	This unit can be assessed independently, however holistic assessment practice with other community services units of competency is encouraged Resource requirements for assessment of this unit include access to: an appropriate workplace where assessment can be conducted or simulation of realistic workplace setting for assessment
Method of assessment:	Assessment may include observations, questioning and evidence gathered from the workplace

Range Statement

RANGE STATEMENT

The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Add any essential operating conditions that may be present with training and assessment depending on the work

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situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

Strategies for the development of policies, practices and standards may include:	Change management Organisation development
Indicators for change include:	Staff Management committee Organisation executive management turnover User involvement Level of commitment to organisation's aims and objectives Relationship with external agencies Change in government polices and associated change in organisation focus
Communication designed to promote the organisation include:	Verbal presentations Letters Brochures Fliers and other written advertisements Poster and other artwork and audiovisual advertisements
Changes in the organisation may be related to:	Nature and focus of service, programs and activities Changing service users Staff requirements Employment and work practices Management decision-making processes Membership changes New buildings and other resources Different levels of funding

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	Legislative change
	Technological change
	External policy change
Strategic alliances will include:	Industry networks
	Professional associations
	Other key agencies/organisations
	Political parties and committees
	Key government officers
	Ministerial advisers and staff
	Ministerial advisory committees
	Key public policy and decision-makers
	Funding agencies
	Business leaders
	Community leaders
	Social/economic/political researchers, analysts and advisers
	Media
	Special interest groups
	Specialist services
Information management may relate, **for example**, **to**:	Establishment and maintenance of policies, procedures and systems to support collection and recording of information required for a range of purposes, such as:
	business analysis, planning and ongoing management
	quality assurance, accreditation and/or audit purposes
	sales and marketing
	organisation review and evaluation processes
	Establishment and maintenance of policies, procedures and systems to ensure security of information where required to address

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	legislative requirements, such as privacy / confidentiality and OHS
	Maintenance of up-to-date client and network database information

Unit Sector(s)

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CHCPOL403B Undertake research activities

Modification History

Not Applicable

Unit Descriptor

Descriptor	This unit describes the knowledge and skills required to implement research relevant to operations of the organisation and/or the community

Application of the Unit

Application	This unit may apply in a range of community service contexts

Licensing/Regulatory Information

Not Applicable

Pre-Requisites

Not Applicable

Employability Skills Information

Employability Skills	This unit contains Employability Skills

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.	The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range

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Statement.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Prepare a research plan	1.1 Ensure views and interests of *stakeholders* are reflected in the research methodology and it and is compatible with ethical considerations 1.2 Select research methodology suitable to needs, purposes and resources and to maximise credibility of outcomes 1.3 Select and use research strategies appropriate to client group, subject matter being researched, the outcomes sought and the resources available 1.4 Ensure research plan incorporates strategies for validating research outcomes
2. Implement appropriate research strategies	2.1 Determine and allocate resources needed to conduct research 2.2 Ensure collection, recording and storage of all relevant information is timely and will ensure validity, confidentiality and security 2.3 Identify a representative range of people and groups with an interest in the issues and consult them in appropriate ways to ensure validity of outcomes 2.4 Undertake consultation according to agreed practices and protocol of own and other agencies 2.5 Consider cultural sensitivities and ethical issues in all consultation
3. Organise and analyse information	3.1 Organise information in a form that allows analysis and suits the research purposes 3.2 Develop patterns in the data and derive explanations, maintaining validity and reliability
4. Report the findings of the	4.1 Report complete and accurate details of the

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ELEMENT	PERFORMANCE CRITERIA
research	research methodology, information and analysis in an accessible and useable style and format 4.2 Provide opportunities for validation of research findings 4.3 Report research results and make them available to all relevant stakeholders

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

The candidate must be able to demonstrate essential knowledge required to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include knowledge of:

- Current and suitable research methodologies, including community based research and participatory research
- Research interview techniques, including consultation methods, protocols and practice
- Information systems, manual and electronic
- Report presentation
- Cultural implications of research methods
- Cultural analysis of information
- Cultural knowledge and ownership issues
- Research ethics

Essential skills:

It is critical that the candidate demonstrate the ability to:

- Carry out research activities that are directly relevant to the organisation and/or the community

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REQUIRED SKILLS AND KNOWLEDGE

In addition, the candidate must be able to effectively do the task outlined in elements and performance criteria of this unit, manage the task and manage contingencies in the context of the identified work role

These include the ability to:

- Demonstrate application of skills in:
  - consultation methods
  - complex communication
  - negotiation with a wide range of known and unknown stakeholders
  - interpretation and analysis of data
  - networking
  - written/oral presentation
- Utilise relevant information technology effectively in line with occupational health and safety (OHS) guidelines

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate this unit of competency:	• The individual being assessed must provide evidence of specified essential knowledge as well as skills • This unit is most appropriately assessed in the workplace or in a simulated workplace and under the normal range of workplace conditions This may include the use of languages other than English and alternative communication systems • It is recommended that assessment take place on one or more occasions but must include all aspects of research activities - preparing, implementing, analysing, and reporting on research

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EVIDENCE GUIDE

Access and equity considerations:	• All workers in community services should be aware of access, equity and human rights issues in relation to their own area of work • All workers should develop their ability to work in a culturally diverse environment • In recognition of particular issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on Aboriginal and Torres Strait Islander people • Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on Aboriginal and/or Torres Strait Islander clients and communities
Context of and specific resources for assessment:	• This unit can be assessed independently, however holistic assessment practice with other community services units of competency is encouraged • Resource requirements for assessment of this unit include access to: • an appropriate workplace where assessment can take place, or simulation of realistic workplace setting for assessment
Method of assessment:	• Assessment may include observations, questioning and evidence gathered from the workplace

Range Statement

RANGE STATEMENT

The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

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RANGE STATEMENT

The contexts for undertaking research may include:	• Preparation of a range of organisation information for policy development, strategic planning, marketing and promotion services, planning new services, reviewing existing services, providing advice to management • Responsibility for research specific to a service, its stakeholders, interests and relationship with the wider community • Specific community or client interests and issues
Stakeholders may be:	• Within the organisation • Within the community • In other areas of delivery and other services, agencies • In the education/training field • Other specialists • Management • Community leaders • Recipients of the service delivery

Unit Sector(s)

Not Applicable

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CULMS207C Assist with the presentation of public activities and events

Modification History

Not applicable.

Unit Descriptor

Unit descriptor

This unit describes the performance outcomes, skills and knowledge required to complete a range of tasks under supervision for the set up and operation of activities and events. As such the unit includes a general knowledge of the issues to be considered in staging any type of activity or event.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit

This unit applies to individuals who provide very basic assistance at any type of event and who work under direct supervision. Events take place across the spectrum of business and community activity, but the unit has particular application in the cultural, hospitality, sporting and tourism sectors.

The skills required for more complex event support roles are covered in other Event Management units in the THT02 Tourism Training Package and THH02Hospitality Training Package.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units Nil

Employability Skills Information

Employability Skills The required outcomes described in this unit of competency contain applicable facets of Employability Skills. The Employability Skills Summary for the qualification in which this unit of competency is packaged, will assist in identifying Employability Skills requirements.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Make preparations for activities or events	1.1 Clarify and confirm details of ***activities and events***, including necessary ***resources***, roles, responsibilities and timelines with supervisor
	1.2 Extract key information from work plans or other documentation and ***confirm specific work requirements*** with supervisor
	1.3 Obtain or organise resources and set up in accordance with work instructions, ensuring all safety requirements are met
2 Complete tasks for activity/event	2.1 Follow agreed plans and procedures for the activity or event in consultation with supervisor and ***other***

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ELEMENT	PERFORMANCE CRITERIA
presentation	***work colleagues***
	2.2 Follow health, safety and security procedures during completion of all work tasks
	2.3 Communicate appropriately with colleagues and customers during completion of work tasks
	2.4 Identify problems promptly and resolve within scope of individual responsibility or refer to supervisor
	2.5 Accurately complete ***required documentation*** and submit to relevant personnel

Required Skills and Knowledge

Required Skills and knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to liaise with other team members and supervisors on routine work issues
- problem solving skills to identify and resolve very simple problems
- literacy skills to interpret work instructions.

Required knowledge

- different types of activities/events and their components in the relevant work context
- roles and responsibilities of different personnel in the set up and operation of an activity/event in the relevant work context
- typical procedures and practices for the set up and operation of public activities and events in the relevant work context
- safety and security requirements and legislation relevant to the work context
- safe manual handling procedures relevant to the work context
- emergency procedures relevant to the work context.

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Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the following is essential:

- general knowledge of activity/event components and different roles and responsibilities in the relevant work context
- ability to complete tasks safely and follow work instructions
- practical demonstration of skills through the provision of assistance with an activity or event.

Context of and specific resources for assessment

Assessment must ensure:

- interaction with others to reflect the communication aspects of the unit
- access to a location in which events or activities take place
- access to an activity or event on which the candidate can work.

Method of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate
- direct observation of the candidate completing tasks during set up or operation of an activity/event
- oral or written questioning to assess knowledge of event components, typical procedures, safety issues.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

- CUFSAF01B Follow health, safety and security procedures.

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Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Activities and events may include:

- guided tours
- exhibitions
- special occasions and festivals
- holiday or weekend activities
- performances e.g. theatre, film, music, craft demonstrations, workshops
- scientific experiments
- excavations, field trips, site visits
- open days
- ceremonies
- school programs

Resources may include:

- lighting
- audiovisual equipment and recordings
- other equipment
- handouts
- props
- transportation
- furniture
- space
- catering
- security
- support materials

Specific work requirements within this unit would generally be quite simple in nature and may relate to:

- assistance with set up of displays
- assistance with bump-in/bump-out
- assistance with equipment set up
- venue preparation
- customer service tasks

Other work colleagues may include:

- supervisor
- peers
- technical specialists

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RANGE STATEMENT

- guides
- education officers
- director/producer
- talent
- curator
- collection management staff
- marketing staff
- security staff

Required documentation may include:

- running sheets
- equipment lists
- attendance sheets
- activity sheets

Unit Sector(s)

Not applicable.

Competency field

Competency field Public Programs

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CUFWRT301A Write content for a range of media

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to write content for a range of media. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	The person applying the skills and knowledge outlined in this unit could be expected to write both original and re-purposed non-narrative content for a range of media. The content could include such things as information for websites; community, news and promotional announcements for radio stations; organisation newsletters and audio or visual presentations. In larger organisations or in the development of e-learning resources, the person would usually be re-purposing material written by other writers or content experts. This work is usually undertaken with some supervision and guidance. The writing of narrative content is covered in: • CUFWRT302A Write simple stories.

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	More complex skills associated with writing can be found in: • CUFWRT401A Edit texts • CUFWRT403A Write narration and current affairs material.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
Prepare to write content	1. Identify ***production requirements*** for ***content*** with

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ELEMENT	PERFORMANCE CRITERIA
	relevant personnel and according to organisational procedures 2. Identify ***purpose*** of content and other ***factors*** that have implications for the way content will be written 3. Identify ***text-based content*** that may be incorporated and referenced, and organise copyright clearances as required 4. Use a range of additional ***sources*** to find information where there are perceived gaps in text-based content 5. Identify needs and perspectives of target users and audience with reference to a range of ***user data*** 6. Generate a range of ideas relevant to purpose of the content to be written 7. In consultation with relevant personnel, evaluate and select most appropriate content ideas and ***writing styles***
Draft content	8. Classify, structure and sequence content so that it is easy to read or navigate 9. Draft content using ***writing and communication principles*** 10. Draft content using ***writing techniques*** appropriate to purpose of the content 11. Provide captions or descriptions for ***media assets*** as required 12. Apply ***presentation techniques*** to enhance readability 13. Refine and redraft content until it meets creative requirements 14. Proofread content and conduct ***readability tests*** if appropriate 15. Submit final draft to relevant personnel for consideration and review
Finalise content	16. Incorporate feedback from relevant personnel into final content 17. Submit content by agreed deadline according to organisational procedures 18. Note areas for improvement in own area of responsibility and take action accordingly

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication, teamwork and literacy skills sufficient to:
  - interpret and clarify written or verbal instructions
  - write content in a style appropriate to target users and audience
  - communicate information to specific audiences
  - structure text-based content effectively for target audiences and delivery format
  - work collaboratively in a team environment - both independently on assignment and under direction
  - respond positively to constructive feedback
- conceptual skills sufficient to generate a range of text-based content ideas in response to a brief
- technical skills sufficient to:
  - proficiently use word processing tools
  - check and proofread written content using manual and automated systems
- self-management and planning skills sufficient to:
  - prioritise work tasks
  - source information and reference material in a timely fashion
  - meet deadlines
  - seek expert assistance when problems arise

Required knowledge

- industry knowledge, including:
  - roles and responsibilities of project team members
  - issues and challenges that arise when writing content
- understanding the way readers scan and read written material
- writing and communication principles for the relevant medium
- writing and presentation techniques for the relevant medium
- sound knowledge of grammar and punctuation
- media laws sufficient to identify defamation and obscenity and seek expert advice on issues that could lead to legal action
- copyright clearance procedures
- OHS as it relates to working for periods of time on computers

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • application of the principles of writing and communication to content written for a range of purposes • content written in a way that engages the target audience • sound knowledge of grammar and punctuation • collaborative approach to work • ability to work under pressure and meet deadlines.

Context of and specific resources for assessment	Assessment must ensure:
	• practical demonstration of skills by writing a range of content within timeframes typical in an industry context
	• access to:
	  • word processing software
	  • variety of information sources
	• access to appropriate learning and assessment support when required
	• use of culturally appropriate processes and techniques appropriate to the language and literacy capacity of learners and the work being performed.

Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance • evaluation of content written by the candidate in response to a range of briefs • written or oral questioning to test knowledge as listed in the required skills and knowledge section of this unit.
Guidance information for	Holistic assessment with other units relevant to the

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EVIDENCE GUIDE	
assessment	industry sector, workplace and job role is recommended, for example: • CUFPPM301A Plan and prepare programs • CUFRES201A Collect and organise content for broadcast or publication • CUFWRT302A Write simple stories.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Production requirements may include:	• availability of staff • budget • confidentiality • contractual • copyright • deadlines • duration of items for on-air presentation • editing process • intellectual property • location • number of content items • schedule • specified number of words • station procedures.
Content may include:	• community service announcements • copy for interactive media products • copy for newsletters or other print media • intros, outros and back announcements • items for wikis • news and current affairs items for community broadcasting • on-air presentation material

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RANGE STATEMENT	

	• sponsorship announcements
	• surveys:
	  • online
	  • print
	  • telephone polling.

Relevant personnel may include:	• asset creators • authors • broadcasters • clients • content experts • directors • editors • graphic designers • information architects • other writers • producers • program managers • programmers • volunteers' coordinators • other technical/specialist staff.

Purposes may include:	• audio and visual presentations
	• educational
	• informational
	• marketing
	• networking:
	  • social
	  • corporate
	• promotional.

Factors may include:	• delivery platform for interactive media content, including:
	  • internet
	  • CD
	  • DVD
	  • games console
	  • kiosk
	  • mobile telephone
	  • personal digital assistant (PDA)
	• target audience characteristics
	• type of program or product:

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RANGE STATEMENT	
	• lifestyle • chat and interview • talkback • news • current affairs • music • interactive game • website.
Text-based content may include:	• actual events • articles • documents • dramatic material • education and training texts • interviews • manuals • news sources • press releases • publications.

Sources may include:	• actual events
	• colleagues
	• commercial enterprises
	• federal, state and local government departments
	• fiction
	• imagination
	• industry associations and organisations
	• industry practitioners and technical experts
	• internet
	• life experience
	• media outlets
	• organisational policies and procedures
	• personal observations and experience
	• publications:
	  • reference books
	  • newsletters and magazines
	  • specialist technical journals
	  • bulletins, press releases and letters
	  • manufacturer handbooks, manuals and promotional material.

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RANGE STATEMENT	
User data may include:	• audience research compiled by external bodies, such as the Australian Bureau of Statistics • focus groups • personas • profiles • site feedback • site metrics • surveys.
Writing styles may include:	• conversational • dialogue • dramatic • formal • humorous • journalistic • plain English • whimsical.
Writing principles may include:	• clear and meaningful • concise • consistent style • correct grammar, punctuation and spelling • factually accurate • logical order.
Communication principles may include:	• communicates the message • conveys meaning • encourages feedback and interaction • meets audience requirements • promotes two-way conversation.
Writing techniques may include:	• applying the inverted pyramid • avoiding clichÃ©s, jargon and slang • choosing appropriate words • crafting paragraphs • crafting sentences • creating relevant hyperlinks by using accessible wording to link internal and external content • cutting verbiage • employing active voice • using plain English • using the 5 Ws: who, what, when, where and why

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RANGE STATEMENT	
	• writing visually for an auditory medium.
Media assets may include:	• 2D animations • 3D animations • audio • graphics • photos • video.
Presentation techniques may include:	• abstracts • blurbs • bullet and numbered lists • captions • formatting • headings and subheadings • hyperlinks • typography.
Readability tests include:	• Flesch-Kinnaid index • Gunning Fog index • W3C Accessibility standards as they apply to text-based content for interactive media.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Communication - writing

Co-requisite units

Co-requisite units		

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Co-requisite units		

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CUFWRT302A Write simple stories

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to write simple stories. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	People with the skills outlined in this unit are able to use both linear and non-linear structures to write simple stories. They could be writing stories for a wide range of products, e.g. interactive media, animations, e-learning resources and the print media. They would typically be writing stories in response to a clearly-defined brief under the supervision of a senior writer or editor. Stories would be short, e.g. a story for one or two animated objects, a dialogue between characters in a learning resource, or a creative piece for a magazine. Skills associated with writing more complex stories are covered in: • CUFWRT402A Write extended stories.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
Clarify storytelling requirements	1. Discuss with ***relevant personnel*** storytelling briefs, including target audience, ***format***, timelines and ***delivery platforms*** 2. Identify purpose of dialogue, characters, point of view and setting to help structure storylines 3. Discuss with relevant personnel possible ***visual and aural storytelling structures*** that would meet the requirements of briefs
Prepare to write stories	4. Research stories from a range of ***creative works*** that may inspire story ideas that meet requirements of briefs 5. Use ***information sources*** to research subject areas 6. Experiment with linear and non-linear storyline structures 7. Use imagination to develop ideas for characters, plots

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ELEMENT	PERFORMANCE CRITERIA
	and settings 8. Develop ideas for scenarios, contexts and situations in which characters act, react and resolve 9. Select story structure and content that best meet requirements of briefs 10. Seek feedback from relevant personnel on proposed story and refine approach as required
Draft stories	11. Use a creative writing style appropriate to specified stories 12. Use ***tools*** to draft stories 13. Use correct grammar, appropriate punctuation and accurate spelling 14. Proofread copy to check for spelling, grammatical, typographic and other errors 15. Submit draft stories to relevant personnel for feedback and amend as required
Refine stories	16. Participate in the testing of stories in line with agreed ***criteria*** 17. Discuss and confirm with relevant personnel additional requirements or modifications to stories 18. Complete necessary amendments within agreed timelines

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication and literacy skills sufficient to:
  - interpret and clarify written or verbal instructions
  - write simple stories that engage specific audiences
  - use correct grammar, spelling and punctuation when writing
- ability to work as a member of a team - both independently on assignment and under direction
- initiative and creativity sufficient to generate simple story ideas in response to a brief
- proficient use of word processing and other software tools

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REQUIRED SKILLS AND KNOWLEDGE

• self-management and planning skills sufficient to:
  • prioritise work tasks
  • meet deadlines
  • seek expert assistance when problems arise

Required knowledge

• industry knowledge, including:
  • roles and responsibilities of project team members
  • issues and challenges that arise when writing simple stories
• purpose of basic elements of a simple story, including:
  • dialogue
  • characters
  • point of view
  • setting
• media laws sufficient to identify defamation and obscenity and seek expert advice on issues that could lead to legal action
• copyright clearance procedures
• OHS standards as they relate to working for periods of time on computers

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • original linear and non-linear stories written for at least two of the delivery platforms listed in the range statement • ability to write simple stories that engage the target audience and meet the requirements of a storytelling brief.
Context of and specific resources for assessment	Assessment must ensure: • access to word processing software • access to a range of information sources as listed in

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EVIDENCE GUIDE	
	the range statement • access to appropriate learning and assessment support when required • use of culturally appropriate processes and techniques appropriate to the language and literacy capacity of learners and the work being performed.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • evaluation of simple stories written by the candidate in line with relevant criteria as listed in the range statement • case studies and problem-solving exercises to determine ability to write simple stories that engage the target audience and meet the requirements of a storytelling brief • written or oral questioning to test knowledge of basic elements of a simple story • written or oral questioning to test knowledge of information sources • review of portfolios of evidence and third-party workplace reports of on-the-job performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCRT301A Develop and extend critical and creative thinking skills • CUFANM301A Create 2D digital animations.

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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RANGE STATEMENT	
Relevant personnel may include:	• directors • producers • clients • information architects • navigation designers • user interface designers • content experts • other writers • producers • authors • programmers • asset creators • graphic designers • other specialist staff.

Formats may include:	• decision trees
	• script templates
	• short fiction
	• short segments for:
	  • plays
	  • musicals
	  • theatre
	  • dance
	  • television or radio programs
	  • newspapers
	  • journals
	  • magazine
	• storyboards.

Delivery platforms may include:	• CD • DVD • film • games console • internet • kiosk • mobile telephone • personal digital assistant (PDA) • print media • television.
Elements of ***visual and aural storytelling structures*** may	• logical progression of visual ideas • music

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RANGE STATEMENT	

include:	• scene setting and establishment
	• sound effects
	• strong link between aural and visual narrative line
	• visual perspective:
	  • close-ups
	  • wide shots.

Creative works may include:	• animations • comics • dance • fiction • films • music lyrics • musicals • newspapers, journals and magazines • non-fiction • plays • radio programs • television programs • theatre.

Information sources may include:	• colleagues
	• commercial enterprises
	• federal, state and local government departments
	• industry associations and organisations
	• industry practitioners and technical experts
	• internet
	• media outlets
	• organisational policies and procedures
	• personal observations and experience
	• publications:
	  • reference books
	  • newsletters and magazines
	  • specialist technical journals
	  • bulletins, press releases and letters
	  • manufacturer handbooks, manuals and promotional material.

Tools may include:	• Script Smart • software, such as: • Inspiration

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RANGE STATEMENT	
	• Story Space • word processing software.

Criteria may include:	• appropriateness of dialogue
	• level of engagement with target audience
	• relevance of story content
	• soundness of story's structure:
	  • linear
	  • non-linear.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Communication - writing

Co-requisite units

Co-requisite units		

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CUFWRT401A Edit texts

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to edit written material. People in editorial roles refine and amend text to enhance the clarity of written communication. They may also be involved in making decisions about the placement of visual material in relation to text. When editing text, they take into account the needs of the readership, the author's intention, available resources and the type of publication. A thorough knowledge of grammar, syntax, spelling and punctuation is essential, along with an eye for detail and a systematic approach to work. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit covers the role of editors or subeditors working in contexts such as book publishing, magazines and journals, corporate, online media, government and not-for-profit organisations. It also covers the role of freelance editors. Even though people in this role work with a fair degree of autonomy, they report to a manager or, in the case of freelance editors, to a client.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
Prepare to edit written content	1. In consultation with ***relevant personnel*** clarify the scope of editing tasks, including timelines 2. Determine style or tone appropriate to the ***publication*** or type of ***communication materials*** 3. Identify factors that have implications for the way content will be edited
Enhance clarity of written communication	4. Amend text according to the principles of ***clear language*** and ***logical structure***

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ELEMENT	PERFORMANCE CRITERIA
	5. Ensure that language level is appropriate to target audience 6. Ensure that ***tone*** is consistent with theme and purpose of the communication 7. Review punctuation to ensure clarity of meaning and ease of reading 8. Review written material for correct use of ***grammar and syntax*** 9. Monitor text for non-inclusive or potentially offensive language 10. In consultation with relevant personnel, clarify areas where content is unclear and amend accordingly, giving due consideration to preserving the integrity of the author's voice as amendments are made 11. Amend text for consistency where additional information has been incorporated 12. Mark up text according to enterprise procedures
Finalise editing process	13. Check accuracy of ***references*** and organise ***copyright clearances*** as required 14. In consultation with relevant personnel, finalise the format and placement of ***visual material*** as required 15. Submit final edited material to relevant personnel by agreed deadline 16. Evaluate editing process, assessing one's own performance and noting areas for future improvement

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• ability to work as a member of a team in producing communications materials
• initiative and flexibility sufficient to:
  • edit material for purpose and structure
  • negotiate changes to written material aimed at enhancing the quality of final products
• proficient use of word processing and other software tools

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REQUIRED SKILLS AND KNOWLEDGE

• communication and literacy skills sufficient to:
  • interpret and clarify written or verbal instructions
  • apply correct grammar, spelling and punctuation when editing
  • edit communication materials with an understanding of audience or reader needs and expectations
  • apply proofreading skills
  • apply appropriate publishing and presentation formats
  • apply non-discriminatory language
• self-management and planning skills sufficient to:
  • prioritise work tasks
  • meet deadlines
  • seek expert assistance as required, e.g. on issues that could lead to legal action

Required knowledge

• industry knowledge, including:
  • roles and responsibilities of project team members
  • issues and challenges that arise when editing text
  • principles involved in the integration of visuals and text
  • principles for writing and editing in plain English
  • rules and conventions for written English, as defined by general and specialist dictionaries and grammar books, and enterprise or government style guides
• effective communication techniques, including effective listening, questioning and non-verbal cues
• legislation, codes of practice and standards sufficient to identify:
  • intellectual property issues
  • copyright and copyright clearance requirements
  • privacy issues
  • editing standards
  • discriminatory or potentially offensive language issues
• OHS standards as they relate to working for periods of time on computers

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential:
	• examples of edited written material that:
	  • demonstrate correct application of grammatical and punctuation conventions
	  • are free of spelling errors
	  • are coherent and clear to read
	  • are presented in a format appropriate to the stipulated audience and purpose
	• ability to work to deadlines
	• collaborative approach to work
	• attention to detail.

Context of and specific resources for assessment	Assessment must ensure: • access to a computer and the internet • access to a range of information, publication and communications material sources as listed in the range statement • provision of workplace sample documents or workplace-oriented simulation case studies or scenarios • access to appropriate learning and assessment support when required • use of culturally appropriate processes and techniques appropriate to the language and literacy capacity of learners and the work being performed.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • evaluation of a range of written material edited by the candidate, which involves comparing the original and final edited copy • case studies and problem-solving exercises to determine ability to correctly apply grammatical and punctuation conventions • written or oral questioning to test knowledge of principles for writing and editing in plain English • written or oral questioning to test knowledge as listed in the required skills and knowledge section of this unit • review of portfolios of evidence and third-party

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EVIDENCE GUIDE	
	workplace reports of on-the-job performance.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCRT402A Collaborate in a creative process • CUFWRT301A Write content for a range of media • CUFWRT302A Write simple stories • CUFWRT402A Write extended stories • CUFWRT403A Write narration and current affairs material.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Relevant personnel may include:	• author • client • editor • graphic artist • graphic designer • manager • marketing and publicity personnel • permissions department personnel • producer • subeditor • typesetter.

Publications may include:	• books
	• corporate documents:
	  • reports
	  • newsletters
	  • marketing and promotional materials, including online

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RANGE STATEMENT	

	• print and online publications:
	  • literary
	  • magazines
	  • journals
	  • newspapers.

Communication materials may include:	• content written for a range of interactive media, such as:
	  • websites
	  • e-learning resources
	  • games
	• essays
	• extended non-fiction writing, including biography
	• feature articles or profiles
	• fiction writing:
	  • short stories
	  • novels
	  • novellas
	• information articles and features
	• life writing or autobiography
	• literary non-fiction
	• marketing materials
	• poetry
	• reports and memos
	• scripted material for broadcast:
	  • news items
	  • intros
	  • outros
	  • voice-overs and narration
	• writing for children:
	  • stories
	  • picture books
	  • novels
	  • non-fiction.

Principles of ***clear language*** may include:	• compliance with genre • consistency of tone • language that is free of: • verbosity

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RANGE STATEMENT	
	• ambiguity • unnecessary repetition • jargon • non-discriminatory language • use of plain English • use of words appropriate to the context.
Elements of ***logical structure*** may include:	• connections between phrases, clauses, paragraphs and sections • paragraph structure • sentence structure.
Tone may include:	• dramatic • entertaining • formal • humorous • informal or casual • informational.
Grammar and syntax may include application of:	• Australian Standards for Editing Practice - Council of Australian Societies of Editors • grammar and punctuation conventions as demonstrated by Australian Government Style Manual and other house style guides.
References may include:	• bibliography • footnote or endnote • index • list of references • table of contents.
Copyright clearances may be required for:	• fonts • quotations from: • literary works • song lyrics • visual material: • photos • illustrations • cartoons.
Visual material may include:	• cartoons • charts • diagrams • illustrations • logos

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RANGE STATEMENT	
	• photos.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Communication - writing

Co-requisite units

Co-requisite units		

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CUFWRT402A Write extended stories

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to write extended stories. It builds on the skills covered in: • CUFWRT302A Write simple stories. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	People with the skills outlined in this unit are able to write extended stories in a range of contexts using appropriate structures and creative narrative development techniques. They could, for example, be writing stories for the print media, television, radio, animations, e-learning resources, games, and fiction or non-fiction projects. They are typically writing stories in response to creative conceptualisations or project briefs, which could be self-generated or developed by others. Examples of extended stories include fully developed non-linear stories for animations or games, learning resources with complex learning and assessment approaches, extended creative responses such as novels or novellas, and non-fiction projects such as biographies.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
Analyse extended story writing requirements	1. Identify the components of a storytelling creative concept, brief or project, including target audience, ***format***, timeline and ***proposed outcomes*** 2. Consider factors such as style, tone and length in relation to ***purpose of the writing task*** 3. Decide on the most appropriate ***structuring technique*** for extended story writing tasks 4. Discuss with ***relevant personnel*** possible ***visual and aural storytelling structures*** if appropriate to storytelling tasks

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ELEMENT	PERFORMANCE CRITERIA
Prepare to write extended stories	5. Research extended and more complex stories from a range of ***creative works*** that may inspire story ideas to meet project requirements 6. Use ***information sources*** to research subject areas 7. Experiment with a range of narrative structures and writing styles and techniques 8. Develop extended ideas for characters, plots and settings 9. Develop complex scenarios, contexts and situations as required 10. Select the story structure, style, techniques and content that best meet the requirements of projects 11. Seek feedback from relevant personnel on proposed stories and refine approach as required
Draft extended stories	12. Draft extended stories using appropriate structuring, style and language 13. Use relevant formatting and presentation techniques 14. Proofread draft stories for appropriate grammar, punctuation and spelling 15. Submit draft manuscripts to relevant personnel for feedback and amend as required
Write final drafts	16. Evaluate extended stories in line with relevant ***criteria*** 17. Discuss and confirm with relevant personnel additional requirements or modifications to the story 18. Complete necessary amendments as required within agreed timelines 19. Evaluate story writing process, assessing one's own performance and noting areas for future improvement

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• learning skills sufficient to improve performance and product through self-reflection and redrafting after feedback • proficient use of word processing and other software tools • communication, teamwork and literacy skills sufficient to:

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REQUIRED SKILLS AND KNOWLEDGE
• interpret creative concepts and briefs • write extended stories that engage specific audiences • use correct grammar, spelling and punctuation when writing • discuss story ideas with colleagues or clients • negotiate amendments to stories • respond positively to constructive feedback on draft stories • initiative and enterprise sufficient to: • develop original, innovative and creative approaches in the storytelling process • experiment with narrative styles and elements to develop a creative sustained vision • extend creative boundaries for self and audience • find creative solutions to problems identified during the process of story development • locate and use resources to broaden own creative experience • self-management and planning skills sufficient to: • prioritise work tasks • plan extended stories in a logical and cohesive way • meet deadlines • seek expert assistance as required
Required knowledge
• industry knowledge, including: • roles and responsibilities of project team members • issues and challenges that arise when writing extended stories • storytelling techniques appropriate to a range of extended story contexts • in-depth knowledge of storytelling narrative, structure and formats appropriate to audience and purpose • research techniques incorporating creative concept development and information compiling • media laws sufficient to identify defamation and obscenity and seek expert advice on issues that could lead to legal action • copyright clearance procedures and privacy protection procedures • OHS standards as they relate to working for periods of time on computers

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • writing of original extended stories applying appropriate format, and indicating creative engagement with extended storytelling techniques • ability to write extended stories that engage the target audience and meet requirements or purpose of a storytelling concept, brief or project.
Context of and specific resources for assessment	Assessment must ensure: • access to word processing software • access to a range of information sources as listed in the range statement • access to appropriate learning and assessment support when required • use of culturally appropriate processes and techniques appropriate to the language and literacy capacity of learners and the work being performed.
Method of assessment	The following assessment methods are appropriate for this unit: • direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance • evaluation of extended stories written by the candidate in line with relevant criteria as listed in the range statement • written or oral questioning to test knowledge of information sources • evaluation of creative and information research sources through report, journal or oral reporting.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • BSBCRT402A Collaborate in a creative process • CUFRES401A Conduct research • CUFWRT401A Edit texts.

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Formats may include:	• anthologies
	• fiction manuscripts
	• literary non-fiction extended features
	• non-fiction manuscripts for book projects
	• script templates
	• storyboards
	• sustained concepts, storylines and narratives for:
	  • plays
	  • musicals
	  • theatre
	  • dance
	  • television or radio
	  • newspapers
	  • journals
	  • magazines.

Proposed outcomes may include:	• children's or young adult novel or non-fiction
	• extended stories for:
	  • plays
	  • musicals
	  • theatre
	  • dance
	  • television or radio productions
	  • newspapers
	  • journals
	  • magazines
	  • anthologies
	  • websites
	  • animated film

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RANGE STATEMENT	
	• games • e-learning resources • non-fiction project, such as: • history • life story • biography • novel or novella • verse novel.
Purpose of the writing task may include:	• artistic response • creative idea transfer • education and training • entertainment • income generation • information transfer • personal development • persuasion • professional outcome • reporting • self-fulfilment.
Structuring techniques may include:	• characters • dialogue • pace • plot and subplots • point of view • setting • story mapping • storyboarding.
Relevant personnel may include:	• agents • asset creators • authors • clients • content experts • directors • editors • graphic designers • information architects • navigation designers • other writers • producers

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RANGE STATEMENT	
	• programmers • publishers • user interface designers • other technical/specialist staff.

Visual and aural storytelling structures may include:	• convergence of image, music and text
	• gestures and other non-verbal communication
	• metaphors, objects, icons and visual meaning
	• music and sound effects
	• musicality:
	  • rhythm
	  • beat
	  • accent
	• physicality
	• signs and meanings
	• visual characterisation
	• visual forms of storytelling.

Creative works may include:	• animations • comics • dance • fiction, including novels, novellas and longer short stories • films • music lyrics • musicals • newspapers, journals and magazines • non-fiction • plays • radio programs • television programs • theatre.
Information sources may include:	• colleagues • commercial enterprises • federal, state and local government departments • industry associations and organisations • industry practitioners and technical experts • internet • media outlets • organisational policies and procedures • personal observations and experience • publications, e.g.:

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RANGE STATEMENT	
	• reference books • newsletters and magazines • specialist technical journals • bulletins • press releases • letters • manufacturer handbooks, manuals and promotional material.

Criteria may include:	• appropriateness of characters and narrative plotting
	• appropriateness of dialogue
	• creative engagement with the format, techniques and style of stipulated extended stories
	• level of engagement with target audience
	• relevance of story content
	• relevance of the creative concept or project
	• soundness of the story's structure:
	  • linear
	  • non-linear
	  • experimental.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Communication - writing

Co-requisite units

Co-requisite units	

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Co-requisite units		

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FNSACC301A Process financial transactions and extract interim reports

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the functions involved in preparation and processing of routine financial documents, preparing journal entries, posting journals to ledgers, preparing, banking and reconciling financial receipts, and extracting a trial balance and interim reports. This unit may apply to job roles subject to licensing, legislative, regulatory or certification requirements so the varying Commonwealth, State or Territory requirements should be confirmed with the relevant body.

Application of the Unit

Application of the unit	The unit can be applied to all sectors of the financial services sector and to job roles such as account clerks and bookkeepers.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Check and verify supporting documentation	1.1. ***Information*** from ***documents*** is identified, checked and recorded 1.2. ***Supporting documentation*** is examined to establish accuracy and completeness and to ensure authorisation by appropriate personnel
2. Prepare and process banking and petty cash documents	2.1. Deposits and withdrawals are accurately entered and balanced according to organisational procedures 2.2. Cheques and card vouchers are checked for ***validity*** before processing 2.3. Banking documentation is reconciled with organisation's financial records 2.4. Petty cash claims and vouchers are checked, processed and recorded and the petty cash book is balanced according to organisational procedures
3. Prepare and process invoices for payment to creditors and for debtors	3.1. Invoices are prepared in accordance with organisational procedures 3.2. Invoices are checked against source documents for accuracy and any errors corrected 3.3. All invoices and related documents are filed for auditing purposes
4. Prepare journals and	4.1. ***Journals*** are prepared ***accurately and completely***

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ELEMENT	PERFORMANCE CRITERIA
batch monetary items	and items batched within organisational timelines 4.2. ***Batch items*** are precisely matched to initial receipt records 4.3. Journals are authorised in accordance with ***organisational policy and procedures***
5. Post journals to ledger	5.1. Journals are posted to ledger accurately and in accordance with organisation input standards with transactions correctly allocated to system and accounts
6. Enter data into system	6.1. Data is entered into system accurately and in accordance with organisation input standards with transactions correctly allocated to system and accounts 6.2. Related systems are updated to maintain the integrity of relationships between financial systems
7. Prepare deposit facility and lodge flows	7.1. A ***deposit facility*** is selected appropriate to the ***banking method*** to be used 7.2. Batch is balanced with deposit facility without error 7.3. ***Security and safety precautions*** are taken appropriate to the method of banking in accordance with organisational policy and ***industry and legislative requirements*** 7.4. ***Proof of lodgement*** is obtained and filed so that it is easily accessible and traceable
8. Extract a trial balance and interim reports	8.1. Any ***special transactions*** are processed accurately 8.2. Cash and credit journals are completed and posted to general ledger 8.3. A trial balance is extracted and checked and other required ***reports*** prepared 8.4. Any ***errors*** are found and corrected

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• communication skills to:

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REQUIRED SKILLS AND KNOWLEDGE
• determine and confirm work requirements, using questioning and active listening as required • share information, listen and understand • read and interpret documentation from a variety of sources • use language and concepts appropriate to cultural differences • numeracy skills to make financial calculations • information technology skills for accessing and using spreadsheets and databases • literacy skills for data analysis and interpretation • evaluative and general analytical skills • organisational skills, including the ability to plan and sequence work
Required knowledge
• accounting conventions, processes and procedures • banking procedures and guidelines • industry codes of practice • legislative and regulatory requirements relevant to the work • organisational policy and procedures • relevant Acts and regulations • security procedures for handling cheques, vouchers and cash

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • accurately enter and balance deposits and withdrawals • process and balance petty cash transactions • check and verify supporting documentation • apply relevant security measures for preparing and banking receipts • batch monetary items and prepare deposit facilities • use knowledge of organisational policies and procedures and legislative requirements to accurately enter data into accounting systems and process journal entries

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EVIDENCE GUIDE	
	• prepare and authorise journals and check journal processing reports • extract and check/correct a trial balance • file documentation to meet all organisational and regulatory requirements.
Context of and specific resources for assessment	Assessment must ensure: • competency is demonstrated in the context of the financial services work environment and conditions specified in the range statement either in a relevant workplace or a closely simulated work environment • access to and the use of a range of common office equipment, technology, software and consumables.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples, in combination, are appropriate for this unit: • evaluating an integrated activity which combines the elements of competency for the unit or a cluster of related units of competency • verbal or written questioning on underpinning knowledge and skills which may include formal examinations • setting and reviewing workplace projects and business simulations/scenarios • evaluating samples of work • accessing and validating third party reports.
Guidance information for assessment	

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Information includes:	• account numbers • addresses

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RANGE STATEMENT	
	• amounts of money, figures • card numbers • cheque numbers • dates • names.
Documents may include:	• application forms • claim forms • petty cash vouchers • invoices • purchase orders • receipts • credit notes • statements • deposit books • delivery dockets • remittance advice.
Supporting documentation may include information that supports the transaction such as:	• suspense reports • reconciliations.
Validity may include:	• signature • dates • amounts.
Journals may include:	• general • cash receipts • cash payments • sales • purchases • returns and allowances.
Preparing journals ***accurately and completely*** means:	• meaningful notation • effective date specified • correct allocation • balanced transaction.
Batch items are:	• grouped receipts treated as a separate transaction entity.
Organisational policy and procedures may include:	• operations manual • internal control guidelines • computer system documentation.

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RANGE STATEMENT	
Deposit facilities may include:	• bank deposit slips • direct debit transaction reports.
Banking methods include:	• personal • through a third party security company • by pick-up.
Security and safety precautions may include:	• banking of all negotiable instruments on day received • all batches posted on day of receipt • cash management processes.
Industry and legislative requirements may cover:	• Anti-Money Laundering and Counter Terrorism Financing Acts • Australian Accounting Standards • Australian Securities and Investments Commission (ASIC) Code • consumer credit legislation • industry codes of practice • occupational health and safety (OHS) Acts and guidelines • Privacy Act • relevant Insurance Act • Stamp Duties Act • Taxation Act • Trade Practices Act.
Proof of lodgement may include:	• bank stamped deposit facility • verified transaction listing.
Special transactions may include:	• introduction of additional capital • drawings of cash and goods • purchase and sale of non-current assets at book value • interest payable and receivable on overdue accounts • dishonour of cheques including write-back of discount • bad debts written off or recovered.
Reports may include:	• balance sheet • trial balance • unadjusted income statement.
Errors may include:	• a transaction not being recorded in a journal or recorded incorrectly • a journal entry not posted to the ledger or posted twice • an entry being made in an incorrect ledger account but on the correct side • entries being made on the wrong side of two ledger

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RANGE STATEMENT	
	accounts • offsetting errors (compensating errors) where two independent errors for the same amount are made.

Unit Sector(s)

Unit sector	Accounting

Competency field

Competency field	

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FNSACC406A Set up and operate a computerised accounting system

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to modify and operate an integrated computerised accounting system. This is generally under supervision and encompasses processing transactions within the system, maintaining the system, producing reports and ensuring system integrity. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	The unit has application across all sectors of the financial services sector and other industry organisations using accounting software. It has application to job roles such as accounts receivable and payable clerks.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Implement an integrated accounting system	1.1. The general ledger, ***chart of accounts*** and subsidiary accounts are implemented in accordance with ***organisational requirements***, ***procedures and policies*** 1.2. Customers, suppliers and inventory items are set up in the system to meet organisational requirements and the reporting requirements of Goods and Services Tax (GST) 1.3. ***Appropriate technical help*** is used to solve any operational problems
2. Process transactions within the system	2.1. Input data is collated, coded and classified before processing 2.2. A wide range of cash and credit ***transactions*** are processed in both a service and trading environment 2.3. The general journal is used to make any ***balance day adjustments*** for prepayments and accruals 2.4. System output are regularly reviewed to verify the

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ELEMENT	PERFORMANCE CRITERIA
	accuracy of data input and adjustments made for any detected processing errors 2.5. An end of financial year rollover is performed
3. Maintain the system	3.1. Any new general ledger accounts, customer, supplier, inventory and fixed asset records are added as required 3.2. An existing chart of accounts, customer, supplier, inventory and fixed asset records and subsidiary accounts are maintained and updated 3.3. The chart of accounts is customised to meet the reporting requirements of the organisation
4. Produce reports	4.1. Reports to indicate the financial performance and financial position of the organisation and for GST purposes are generated as required or requested 4.2. ***Reports*** to ensure that ***subsidiary ledgers*** and accounts reconcile with the general ledger are generated 4.3. Reports, which ensure that the bank account reconciles with the bank statement, over at least two reporting periods are generated
5. Ensure system integrity	5.1. Regular back-ups of the system are made to ensure against loss or corruption of data 5.2. Data are restored from back-ups in the event of loss or corruption of current data 5.3. A secure record of all processed transactions is maintained for audit purposes

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication skills to:
  • determine and confirm work requirements, using questioning and active listening as required
  • liaise with others, share information, listen and understand
  • use language and concepts appropriate to cultural differences

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REQUIRED SKILLS AND KNOWLEDGE

• research skills such as:
  • accessing and managing information
  • interpreting documentation
• numeracy skills for financial calculations and analysis
• well-developed IT skills for modifying and using integrated financial software
• literacy skills for identifying and using financial data from a variety of sources
• problem solving skills to identify any issues that have the potential to impact on the data entry and reporting process and to develop options to resolve these issues when they arise
• organisational skills, including the ability to plan and sequence work

Required knowledge
• organisational procedures and policies relating to maintaining financial records • principles and practices of accrual accounting • principles of double entry accounting • relevant financial services industry legislation and statutory requirements • the characteristics and included information in relevant source documents of financial data

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • set up an organisation's chart of accounts by modifying an established integrated financial software system • interpret and apply organisational policies and procedures • implement an integrated accounting system ensuring integrity of the data • process transactions within the integrated system and generate reports • maintain the integrated system.
Context of and specific resources for assessment	Assessment must ensure: • competency is demonstrated in the context of the financial

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EVIDENCE GUIDE	
	services work environment and conditions specified in the range statement either in a relevant workplace or a closely simulated work environment • access to and the use of a range of common office equipment, technology, software and consumables. • access to an integrated financial software system and associated data • access to the internet.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples, in combination, are appropriate for this unit: • evaluating an integrated activity which combines the elements of competency for the unit or a cluster of related units of competency • verbal or written questioning on underpinning knowledge and skills • setting and reviewing projects using specialised software • evaluating samples of work • accessing and validating third party reports.
Guidance information for assessment	

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Chart of accounts may include:	• classified expenses by type • current assets • current liabilities • equity • income • non-current assets • non-current liabilities.

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RANGE STATEMENT	
Organisational requirements, ***procedures and policies*** may include:	• Australian Accounting Standards • corporate governance • correctly identifying and opening files within an organisational permit • electronic and paper-based recording • log on and system security procedures • organisational health and safety (OHS) policies, procedures and programs • storing data to security requirements and for appropriate future access.
Appropriate technical help may include:	• computer help desk personnel • designated technology assistance staff • external staff employed or recommended by the software supplier to assist with difficulties • managers and supervisors • on-screen help • online help • software manuals.

Transactions may include:	• adjustment notes
	• bad debts
	• bank reconciliation
	• cash sales and deposits
	• cheque payments
	• commencing business entry
	• commission
	• contra entries
	• credit card payments
	• customer payments
	• discounts
	  • financial
	  • sales
	• funds transfers
	• inventory stock take
	• loans
	• petty cash
	• purchase and sale of stock
	• purchase invoices
	• purchase orders
	• sales invoices
	• supplier payments

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RANGE STATEMENT	
	• withdrawal of stock and assets by owner.
Balance day adjustments may include:	• accrued expenses • depreciation • doubtful debts • prepaid expenses • revenue received in advance.
Reports may include:	• aged payables and reconciliation • aged receivables and reconciliation • asset listing • auditable transaction trail • balance sheet • bank reconciliation • business activity statement • customer statements • inventory listing • profit and loss.
Subsidiary ledgers may include:	• accounts payable • accounts receivable • fixed assets • inventory.

Unit Sector(s)

Unit sector	Accounting

Competency field

Competency field	

Co-requisite units

Co-requisite units		

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Co-requisite units		

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FNSFLT201A Develop and use a personal budget

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop, implement and monitor a personal savings budget. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit has wide application and may be used in workplaces, schools, adult and community learning organisations or registered training organisations in order to build the financial literacy of learners. The unit may also be used as part of pre-vocational or new apprenticeship programs or as part of services provided by counselling or advisory organisations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Analyse and discuss budgeting as a financial tool	1.1. The role of budgeting in the lives of ***different groups*** and the importance of budgeting appropriately to meet expenses is analysed and discussed and related to ***different stages of life*** 1.2. The importance of setting ***financial goals*** is analysed and discussed 1.3. ***Obstacles*** that might prevent financial goals being achieved are analysed and discussed with the types of ***behaviours and skills*** required for successful budgeting explored and analysed
2. Develop a personal budget	2.1. All income and expenses for a six month period are recorded to assist in estimating expenditure requirements 2.2. A ***spreadsheet*** for recording all budget information is obtained or developed and established to record income and expenditure for a relevant period of time 2.3. All ***sources of income*** and regular ***fixed expenses*** and ***variable expenses*** for the specified period are identified and listed in a personal budget using the budget spreadsheet
3. Develop a personal	3.1. Total expenses recorded are subtracted from the total

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ELEMENT	PERFORMANCE CRITERIA
budget	income to determine a surplus or deficit budget for the specified period 3.2. Reasons for a deficit budget are explored if relevant and ***ways to reduce expenses or increase income*** are investigated 3.3. Allocation of surplus funds towards saving and meeting identified financial goals is explored
4. Implement and monitor the personal budget	4.1. The budget is followed according to plan for a period of time 4.2. Actual expenses and income for the period during which the budget is implemented are recorded and compared to budgeted expenses and income with any differences in budgeted and actual amounts looked at and the budget modified where necessary 4.3. ***Handy hints*** for managing the personal budget are discussed 4.4. Ongoing review of the budget is conducted to ensure it remains relevant and to ensure updates are incorporated if necessary

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - clearly explain budgeting principles
  - use questioning to develop clear understanding
  - liaise with others, share information, listen and understand
  - use language and concepts appropriate to cultural differences
- numeracy and IT skills to:
  - calculate interest and loan repayments and surplus or deficit funds
  - use a calculator
  - useinternet information
- literacy skills for interpreting relevant information
- learning skills to maintain knowledge of budgeting and saving techniques

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge
• principles of budgeting • role of credit and savings in establishing personal wealth • understanding of the financial institutions and their savings products

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • explain the benefits and purposes of budgeting • prepare a budget spreadsheet • explain the difference between fixed and variable expenses • prepare and implement a personal budget.
Context of and specific resources for assessment	Assessment must ensure: • competency is demonstrated in the context of the the range statement • access to and the use of a range of common office equipment, technology, software and consumables • access to information about the budgeting process, personal financial records, software and other relevant resources.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples, in combination, are appropriate for this unit: • evaluating an integrated activity which combines the elements of competency for the unit or a cluster of related units of competency • verbal or written questioning on underpinning knowledge and skills • setting and reviewing simulations or scenarios • group discussion to determine and confirm understanding.
Guidance information for	

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EVIDENCE GUIDE	
assessment	

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

The different groups who may budget may include:	• families
	• governments
	• individuals:
	  • single
	  • married
	  • elderly
	  • students
	  • tourists, travellers.

Different stages of life may include:	• approaching and during retirement • buying your first home • moving out of home • starting a family • studying.

Financial goals may include:	• accumulating a set amount of money by a specified date in the future for the purposes of:
	  • purchasing assets
	  • financing holidays, educational expenses, home renovations and other known future expenses
	  • establishing a deposit for an investment such as a home or investment property
	• aiming to repay existing debts and be debt free
	• establishing a regular savings plan
	• handling income and expenditure responsibly and avoiding financial difficulties.

Obstacles that might prevent financial goals	• being unemployed, particularly long term unemployed • insufficient income to afford items that are beyond the

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RANGE STATEMENT	

being achieved may include:	individual's means
	• unexpected circumstances such as:
	  • losing a job
	  • falling ill
	  • not being able to work.

Behaviours and skills required for successful budgeting may include:	• controlled spending • disciplined approach to money • organisational skills • record keeping skills.
Budget refers to:	• a calculation of all projected income and expenditure for period of time (e.g. on a weekly or monthly basis) • showing all projections versus actual income and expenses for the period and monitoring variances.
A ***spreadsheet*** may:	• be simple or complex depending upon the extent of the individual's finances • have one section for recording all money received as income and another section for expenses both variable and fixed • have a section to record the difference between income and expenses for the period, this being the surplus or deficit financial situation for the period.
Sources of income may include:	• interest on investments, dividends • proceeds from sale of assets • social security benefits, pensions, allowances, child assistance • wages, commission, bonuses, tips.

Fixed expenses may include:	• fees:
	  • school and university fees
	  • bank fees
	• insurance
	• loan repayments (if loan is based upon fixed interest rates) such as:
	  • personal loans
	  • car loans
	  • credit card debts
	  • Higher Education Contribution Scheme (HECS)
	• public transport
	• rates
	• rent
	• subscriptions to:

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RANGE STATEMENT	
	• magazines • newspapers • clubs • travel including public transport, petrol

Variable expenses may include:	• car maintenance
	• living expenses such as:
	  • food
	  • clothing
	  • medical
	• loan repayments if loan is based upon variable interest rates
	• miscellaneous expenses such as:
	  • gifts
	  • recreation
	  • entertainment
	  • fines
	• mobile telephone
	• mortgage repayments
	• utilities such as:
	  • water
	  • gas
	  • electricity
	  • telephone.

Ways to reduce expenses may include:	• comparing prices for essential items • monitoring use of utilities such as electricity, gas and water • moving back home • reducing expenditure on discretionary items such as expensive clothing, magazines, eating out • share accommodation • using cheaper modes of transport.
Ways to increase income may include:	• combining part-time work with studying • investigating eligibility for student allowances or other relevant government benefits • taking on a part-time job or holiday work.
Handy hints may include discussing:	• how to avoid getting into financial difficulties • how to minimise fees and charges imposed by financial institutions • how to use credit card debt effectively

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RANGE STATEMENT	
	• the problems of impulsive buying, particularly when under peer pressure • ways to cut back on spending or change negative spending habits.

Unit Sector(s)

Unit sector	Financial literacy

Competency field

Competency field	

Co-requisite units

Co-requisite units		

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FNSFLT203A Develop understanding of debt and consumer credit

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to understand the functions and implications of different forms of credit and the strategies and methods to make appropriate and effective decisions regarding the management of personal debt and the use of credit facilities. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit has wide application and may be used in workplaces, schools, adult and community learning organisations or registered training organisations in order to build the financial literacy of learners. The unit may also be used as part of pre-vocational or new apprenticeship programs or as part of services provided by counselling or advisory organisations.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify and discuss the role of credit in society	1.1. The concepts and terminology of credit provided by a financial institute and debt incurred by a borrower are analysed and discussed 1.2. The historical and current ***role of consumer credit*** within Australian society is identified and ***advantages and disadvantages of credit*** use are analysed and discussed 1.3. The impact of consumer debt on the national economy is analysed and discussed
2. Identify and discuss the range of credit options available	2.1. Types of ***credit facilities*** used by businesses are analysed and compared 2.2. Types of credit facilities used by individuals are analysed and compared 2.3. ***Differences between unsecured and secured loans*** are analysed and discussed

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ELEMENT	PERFORMANCE CRITERIA
	2.4. ***Implications of default*** on secured loans are explained to the client
3. Identify and discuss costs of using credit	3.1. ***Fees and costs*** associated with different types of credit options are ***analysed and compared*** 3.2. The features and associated risks of fixed versus variable interest rates are analysed and compared 3.3. ***Ways to compare advertised interest rates*** and the effects of fees and charges are analysed and discussed
4. Analyse and discuss the effective use of consumer credit	4.1. Ways to avoid excessive or unmanageable debt are analysed and discussed 4.2. ***Strategies to minimise fees*** on credit are identified and discussed 4.3. The importance of meeting minimum payments on credit cards is analysed and discussed 4.4. ***Ways to avoid credit card fraud*** are identified, analysed and discussed
5. Manage personal credit rating and history	5.1. The role of credit reference agencies is analysed and discussed 5.2. The purpose and use of ***credit reference reports*** in assessing loan applications is analysed and discussed 5.3. ***Implications of establishing a poor credit history*** are analysed and discussed 5.4. The right to access and ***methods of obtaining own credit reference report*** are analysed and discussed

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills

• communication skills to:
  • clearly explain debt and credit implications
  • use questioning to develop clear understanding
  • liaise with others, share information, listen and understand
  • use language and concepts appropriate to cultural differences
• numeracy and IT skills to:

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REQUIRED SKILLS AND KNOWLEDGE
• calculate credit costs and payments • use a calculator • use internet information • literacy skills for interpreting relevant information • learning skills to maintain knowledge of credit issues and management
Required knowledge
• principles of lending and credit • role of credit in society • the role of financial institutions, regulatory bodies, credit reference agencies and consumer advisory bodies that are involved in the provision and management of credit

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • analyse and clearly explain the role of credit within the community • analyse and clearly explain the different types of consumer credit options currently available • analyse and clearly explain the associated implications and risks of the various credit schemes available, as well as the implication of establishing a poor credit reference history.
Context of and specific resources for assessment	Assessment must ensure: • competency is demonstrated in the context of the the range statement • access to and the use of a range of common office equipment, technology, software and consumables • access to internet to source information.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples, in combination, are

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EVIDENCE GUIDE	
	appropriate for this unit: • evaluating an integrated activity which combines the elements of competency for the unit or a cluster of related units of competency • verbal or written questioning on underpinning knowledge and skills • setting and reviewing simulations or scenarios • group discussion to determine and confirm understanding.
Guidance information for assessment	

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
The ***role of consumer credit*** includes:	• enabling approved applicants the ability to purchase items (goods and/or services) where the cost of the item exceeds current savings available.

Advantages and disadvantages of credit may include:	• advantages:
	  • obtain and can use purchased item immediately
	  • minimises the need to carry cash or write cheques
	  • allows for instalment payments on expensive items
	  • convenient form of payment when travelling, especially overseas
	• disadvantages:
	  • may increase cost of items purchased due to interest accrued
	  • usually attracts other fees such as account servicing fees
	  • can lead to compulsive buying habits
	  • creates a false sense of wealth.

Consumer ***credit***	• fixed:

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RANGE STATEMENT	
facilities may include:	• personal loans • leases including mobile phones, cars, business premises, office equipment including personal computers • hire purchase • 'buy now, pay later' schemes • revolving: • credit cards • store cards • overdraft.
Differences between unsecured and secured loans include:	• a secured loan is supported by an underlying asset while an unsecured loan is not • unsecured loans attract higher interest rates due to increased risk to the lending institution.
Implications of default on secured loans include:	• any shortfall in sale of repossessed asset against outstanding loan amount must be paid by borrower • repossession of the underlying asset by the lending institution.
Fees and costs associated with different credit options may include:	• account servicing fees • credit purchase fees • late payment fees • loan establishment fees • withdrawing from a foreign Automatic Teller Machine (i.e. the ATM of a lending institution other than your own).
Fees and costs may be ***analysed and compared*** using:	• manually, comparing fees and costs drawn from tables and charts provided by financial institutions and analysed using a calculator • online, web-based, calculation tools • software applications such as spreadsheets.
Ways to compare advertised interest rates may include:	• informing the client of the 'comparison rate' which includes all associated fees and charges.
Strategies to minimise fees on credit may include:	• consolidating savings and credit facilities with the one institution where account servicing fees can be cancelled out • knowing how many free transactions come with the card • paying the minimum monthly instalment on time.
Ways to avoid credit	• not disclosing Personal Identification Number (PIN) to anyone

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RANGE STATEMENT	
card fraud include:	• selecting a PIN only the card holder would know • signing the back of the credit card.
Credit reference reports refers to:	• reports established and maintained by credit reference agencies which record all negative events (i.e. defaults) listed by creditors against debtors.
Implications of establishing a poor credit history may include:	• higher interest rate penalties • inability to obtain finance in the future • may disadvantage applications for rental accommodation • necessity to obtain guarantor in future loans.
Methods of obtaining own credit reference file may include:	• writing, emailing or telephoning the relevant agency requesting a copy of your file, having provided relevant details to identify self.

Unit Sector(s)

Unit sector	Financial literacy

Competency field

Competency field	

Co-requisite units

Co-requisite units		

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FNSSAM301A Identify opportunities for cross-selling products and services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to identify cross-selling opportunities and sell the identified products or services to customers while providing other services. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit may be applied across all sectors of the financial services industry.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify opportunities for cross-selling of products and services	1.1. A range of ***communication and interpersonal skills*** are used to respond to an enquiry, identify ***customer needs*** and establish a relationship with the customer 1.2. Based on understanding of customer needs, further opportunities for providing the customers with additional products or services are identified with further information about the identified products and services accessed if required
2. Promote sales of products and services	2.1. Benefits and features of additional products or services are explained to the customer clearly and accurately 2.2. Product knowledge is used to match ***organisation products or services*** to the assessed customers' needs and a number of options offered 2.3. Compliance with relevant ***legislation***, ***regulations*** and industry codes of practice of all options developed is checked
3. Refer sales/service to appropriate area	3.1. When a decision has been reached on sale of the product or service to be provided, ***documentation*** relating to the interaction is prepared for processing 3.2. Customer is informed of the reasons why referral to other personnel is required if this needs to occur

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - determine and confirm customer requirements, using questioning and active listening as required
  - sell products and services
  - refer customers and liaise with others, share information, listen and understand
  - use language and concepts appropriate to cultural differences
- IT skills for accessing and using appropriate software such as spreadsheets and databases and using internet information
- literacy skills for analysing information and products to ensure appropriateness to customer needs, currency and accuracy
- interpersonal skills to establish rapport with customers and to liaise with other team members
- problem solving skills to address customer product or service issues
- teamwork skills
- organisational skills, including the ability to plan and sequence work

Required knowledge

- customer relation building techniques
- financial products and services offered by or through an organisation
- finance industry and organisational policies and procedures
- organisational complaints procedures
- product knowledge including:
  - the range of products
  - features of each:
    - interest rates
    - term
    - special packages
- relevant legislation and potential/actual impact on information requested or provided
- selling techniques

Evidence Guide

EVIDENCE GUIDE

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EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • interact with customers and identify cross-selling opportunities • clearly explain additional products and services that may be beneficial to customers, and provide options based on the customer's needs in line with relevant legislation, regulations and industry codes of practice • refer customers to other appropriate sections of the organisation, if required.
Context of and specific resources for assessment	Assessment must ensure: • competency is demonstrated in the context of the financial services work environment and conditions specified in the range statement either in a relevant workplace or a closely simulated work environment • access to and the use of a range of common office equipment, technology, software and consumables • access to financial services product information.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples, in combination, are appropriate for this unit: • evaluating an integrated activity which combines the elements of competency for the unit or a cluster of related units of competency • observing processes and procedures in workplaces or role plays • verbal or written questioning on underpinning knowledge and skills • setting and reviewing workplace projects and business simulations or scenarios • accessing and validating third party reports.
Guidance information for assessment	

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Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Communication and interpersonal skills may include:	• empathising with customers needs • establishing rapport • listening and questioning techniques • remembering customer details such as name and special interests.
Customer needs may include:	• special needs of people from different cultural backgrounds, aged and those with a disability in relation to additional products and services • financial, insurance, banking or other financial services or products.

Organisation products and services may include:	• those provided by the organisation such as:
	  • savings
	  • investment
	  • loans
	  • travel
	  • superannuation
	  • insurance
	  • other services.

Legislation, ***regulations*** may include:	• Australian Competition and Consumer Commission (ACCC)
	• consumer:
	  • Consumer Credit Code
	  • Privacy Act
	  • secrecy laws
	  • codes of practice
	• prudential:
	  • Bills of Exchange Act
	  • Cheques and Payment Orders Act
	  • Credit Reference Association of Australia (CRAA)
	  • Electronic Funds Transfer (EFT) Code of Conduct
	  • Financial Institutions (FI) Code
	  • Financial Transaction Reports Act.

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RANGE STATEMENT	
Documentation may include:	• application forms for opening accounts for products and services.

Unit Sector(s)

Unit sector	Sales and marketing

Competency field

Competency field	

Co-requisite units

Co-requisite units		

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FNSSAM402A Implement a sales plan

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to develop, implement and review a sales and promotional strategy for a financial services organisation. This unit has application to a variety of financial services sectors and is applicable to individuals working within enterprises and job roles subject to licensing, legislative, regulatory or certification requirements so the varying Commonwealth, State or Territory requirements should be confirmed with the relevant body.

Application of the Unit

Application of the unit	This unit may be applied in any sector of the financial services industry.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Implement promotional strategy	1.1. Sales plan is analysed to clarify strategy and sales targets 1.2. ***Promotional package*** is created to meet the requirements of the sales plan and enhance the business corporate image and satisfy all relevant ***legislation***, ***regulations and codes of practice*** 1.3. Promotional strategy is implemented within budget and in the timeframes specified
2. Prepare distribution channels	2.1. ***Distribution channels*** are identified and agreements for selling products and/or services are reached 2.2. Training of personnel is undertaken to develop product and service knowledge and to ensure quality customer service is maximised 2.3. Promotional materials are distributed to sales people through established distribution channels within appropriate timeframes
3. Monitor and review sales plan implementation	3.1. Criteria to measure the effectiveness of the promotional strategy and ***performance criteria*** for sales staff and distribution channels are established so attainment of forecast sales target can be monitored

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ELEMENT	PERFORMANCE CRITERIA
	3.2. Adjustments to the promotional strategy or product and service distribution are made, as necessary, to ensure the required result is being obtained 3.3. Feedback on the implementation of the sales plan and promotional strategy is contributed to the sales planning process

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - determine and confirm sales planning requirements, using questioning and active listening as required
  - liaise with others, share information, listen and understand
  - use language and concepts appropriate to cultural differences
- IT skills for accessing and using appropriate software such as spreadsheets and databases and using internet information
- well-developed literacy skills to:
  - analyse information and products to ensure appropriateness to client needs, currency and accuracy
  - draft clear and accurate sales plans and supporting documentation
- problem solving skills to address product or service selling issues
- teamwork skills and skills to identify training needs and opportunities
- organisational skills, including the ability to plan and sequence work
- marketing skills

Required knowledge

- marking techniques and market trends
- products and services provided by the organisation
- sales and promotion techniques
- training strategies

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Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • successfully develop a sales plan based on analysis of the market • implement a sales strategy including putting appropriate sales training in place • evaluate and make necessary adjustments to ensure the success of a sales plan.
Context of and specific resources for assessment	Assessment must ensure: • competency is demonstrated in the context of the financial services work environment and conditions specified in the range statement either in a relevant workplace or a closely simulated work environment • access to and the use of a range of common office equipment, technology, software and consumables • access to financial services product information.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples, in combination, are appropriate for this unit: • evaluating an integrated activity which combines the elements of competency for the unit or a cluster of related units of competency • observing processes and procedures in workplaces or role plays • verbal or written questioning on underpinning knowledge and skills • setting and reviewing business simulations or scenarios • accessing and validating third party reports.
Guidance information for assessment	

Range Statement

RANGE STATEMENT

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RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Promotional packages may include:	• client newsletters/bulletins
	• media advertising such as:
	  • radio
	  • television
	  • newspapers
	  • trade journals
	  • direct marketing
	  • websites
	• product and services brochures
	• promotional products or give-aways, third party services.

Distribution channels may include:	• brokers • common interest groups • agents • existing clients • associations • telemarketing.
Legislation, regulations and codes of practice may include	• anti-discrimination legislation • Australian Accounting Standards • Australian Prudential Regulation Authority (APRA) • business names legislation • Consumer Credit Code • Corporations Act (including Accounting Standards) • Electronic Funds Transfer (EFT) Code of Conduct • Finance Code • Financial Services Reform Act (FSRA) • Financial Transaction Reports Act • industry codes of practice • Privacy Act • taxation law.
Performance criteria may include:	• meeting targets • new clients • surveys of awareness of products and/or services • volume of sales.

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Unit Sector(s)

Unit sector	Sales and marketing

Competency field

Competency field	

Co-requisite units

Co-requisite units		

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HLTFA301B Apply first aid

Modification History

Unit Descriptor

This unit of competency describes the skills and knowledge required to provide first aid response, life support, management of casualty(s), the incident and other first aiders, until the arrival of medical or other assistance

Application of the Unit

These skills and knowledge may be applied in a range of situations, including community and workplace settings

Training Package users should ensure implementation is consistent with any specific workplace and/or relevant legislative requirements in relation to first aid, including State/Territory requirements for currency

Application of these skills and knowledge should be contextualised as required to address specific industry, enterprise or workplace requirements and to address specific risks and hazards and associated injuries

A current Senior First Aid, Workplace Level 2 or Level 2 qualification may provide evidence of skills and knowledge required by this competency unit. However, as with all evidence of competence, evidence must be assessed against the requirements specified in the competency unit

Licensing/Regulatory Information

Pre-Requisites

Employability Skills Information

The required outcomes described in this unit of competency contain applicable facets of Employability Skills

The Employability Skills Summary of the qualification in which this unit of competency is packaged will assist in identifying Employability Skill requirements

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

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Elements and Performance Criteria

Elements and Performance Criteria

Element	Performance Criteria
1 Assess the situation	1.1 Identify assess and minimise **hazards** in the situation that may pose a risk of injury or illness to self and others
	1.2 Minimise immediate **risk** to self and casualty's health and safety by controlling any hazard in accordance with occupational health and safety requirements
	1.3 Assess casualty and identify injuries, illnesses and conditions
2 Apply first aid procedures	2.1 Calmly provide information to reassure casualty, adopting a communication style to match the casualty's level of consciousness
	2.2 Use available **resources and equipment** to make the casualty as comfortable as possible
	2.3 Respond to the casualty in a culturally aware, sensitive and respectful manner
	2.4 Determine and explain the nature of casualty's injury/condition and relevant first aid procedures to provide comfort
	2.5 Seek consent from casualty prior to applying first aid management
	2.6 Provide **first aid management** in accordance with **established first aid principles** and Australian Resuscitation Council (ARC) Guidelines and/or State/Territory regulations, legislation and policies and industry requirements
	2.7 Seek first aid assistance from others in a timely manner and as appropriate
	2.8 Correctly operate first aid equipment as required for first aid management according to manufacturer/supplier's instructions and local policies and/or procedures

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		2.9	Use safe manual handling techniques as required
		2.10	Monitor **casualty's condition** and respond in accordance with effective first aid principles and procedures
		2.11	Finalise casualty management according to casualty's needs and first aid principles
3	Communicate details of the incident	3.1	Request ambulance support and/or appropriate medical assistance according to relevant circumstances using relevant **communication media and equipment**
		3.2	Accurately convey assessment of casualty's condition and management activities to ambulance services /other emergency services/relieving personnel
		3.3	Prepare reports as appropriate in a timely manner, presenting all relevant facts according to established procedures
		3.4	Accurately record details of casualty's physical condition, changes in conditions, management and response to management in line with established procedures
		3.5	Maintain confidentiality of records and information in line with privacy principles and statutory and/or organisation policies
4	Evaluate own performance	4.1	Seek feedback from **appropriate clinical expert**
		4.2	Recognise the possible psychological impacts on rescuers of involvement in critical incidents
		4.3	Participate in debriefing/evaluation as appropriate to improve future response and address individual needs

Required Skills and Knowledge

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This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

ARC Guidelines relating to provision of first aid as outlined

Working knowledge of:

basic principles and concepts underlying the practice of first aid

procedures for dealing with major and minor injury and illness

priorities of management in first aid when dealing with life threatening conditions

basic occupational health and safety requirements in the provision of first aid

infection control principles and procedures, including use of standard precautions

chain of survival

first Aiders' skills and limitations

Understanding of the use of an Automated External Defibrillator (AED), including when to use and when not to

First aid management of:

abdominal injuries

allergic reactions

altered and loss of consciousness

bleeding

burns - thermal, chemical, friction, electrical

cardiac arrest

casualty with no signs of life

chest pain

choking/airway obstruction

injuries: cold and crush injuries; eye and ear injuries; head, neck and spinal injuries; minor skin injuries; needle stick injuries; soft tissue injuries including sprains, strains, dislocations

envenomation - snake, spider, insect and marine bites

environmental impact such as hypothermia, hyperthermia, dehydration, heat stroke

fractures

medical conditions, including cardiac conditions, epilepsy, diabetes, asthma and other respiratory conditions

near drowning

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poisoning and toxic substances (including chemical contamination)

respiratory distress

seizures

shock

stroke

substance misuse - common drugs and alcohol, including illicit drugs

Awareness of stress management techniques and available support

Social/legal issues:

duty of care

need to be culturally aware, sensitive and respectful

importance of debriefing

confidentiality

own skills and limitations

Essential skills:

Ability to:

Conduct an initial casualty assessment

Plan an appropriate first aid response in line with established first aid principles, policies and procedures, ARC Guidelines and/or State/Territory regulations, legislation and policies and industry requirements and respond appropriately to contingencies in line with own skills

Demonstrate correct procedures for performing CPR using a manikin, including standard precautions (i.e. as per unit **HLTCPR201A Perform CPR**)

Apply first aid principles

Infection control, including use of standard precautions

Follow OH&S guidelines

Demonstrate:

safe manual handling

consideration of the welfare of the casualty

ability to call an ambulance

site management to prevent further injury

Provide assistance with self-medication as per subject's own medication regime and in line with State/Territory legislation, regulations and policies and any available

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medical/pharmaceutical instructions

Administer medication in line with state/territory regulations, legislation and policies

Prepare a written incident report or provide information to enable preparation of an incident report

Communicate effectively and assertively in an incident

Make prompt and appropriate decisions relating to managing an incident in the workplace

Call an ambulance and/or medical assistance according to relevant circumstances and report casualty's condition

Use literacy and numeracy skills as required to read, interpret and apply guidelines and protocols

Evaluate own response and identify appropriate improvements where required

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package. The evidence guide supplements assessment requirements that apply to all units in this Training Package. Users of this evidence guide should first read the package's assessment guidelines.

Critical aspects of assessment:	Assessment must include demonstrated evidence of specified Essential Knowledge and Essential Skills identified in this competency unit Competence should be demonstrated working individually and, where appropriate, as part of a first aid team Consistency of performance should be demonstrated over the required range of situations relevant to the workplace or community setting Currency of first aid knowledge and skills is to be demonstrated in line with State/Territory regulations, legislation and policies, ARC and industry guidelines
Context and resources required for	Skills in performing first aid procedures are to be assessed through demonstration, with

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assessment:	questioning to confirm essential knowledge For assessment purposes, demonstration of skills in CPR procedures requires using a model of the human body (resuscitation manikin) in line with Australian Resuscitation Council Guidelines
Access and equity considerations:	All workers in the health industry should be aware of access and equity issues in relation to their own area of work All workers should develop their ability to work in a culturally diverse environment In recognition of particular health issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on health of Aboriginal and Torres Strait Islander people Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on health of Aboriginal and/or Torres Strait Islander clients and communities

Range Statement

RANGE STATEMENT

The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

Contextualisation to address specific requirements may include:	Focus on first aid management of specific types of injury First aid provision under specific constraints

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	or circumstances (e.g. in confined spaces, in maritime work environment or in work environment involving identified risks/hazards)
Established first aid principles include:	Preserve life Prevent illness, injury and condition(s) becoming worse Promote recovery Protect the unconscious casualty
Vital signs include:	Consciousness Breathing Circulation
A hazard is:	A source or situation with the potential for harm in terms of human injury or ill-health, damage to property, the environment, or a combination of these
Hazards may include:	Physical hazards Biological hazards Chemical hazards Hazards associated with manual handling
Risks may include:	Risks from equipment, machinery and substances Risks from first aid equipment Environmental risks Exposure to blood and other body substances Risk of further injury to the casualty Risks associated with the proximity of other workers and bystanders

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	Risks from vehicles
Casualty's condition is managed for:	Abdominal injuries Airway obstruction Allergic reactions Altered and loss of consciousness Bleeding Burns - thermal, chemical, friction, electrical Chest pain/cardiac arrest Injuries: cold and crush injuries; eye and ear injuries; head, neck and spinal injuries; minor skin injuries; needle stick injuries; soft tissue injuries including sprains, strains, dislocations Near drowning Envenomation - snake, spider, insect and marine bites Environmental conditions such as hypothermia, hyperthermia, dehydration, heat stroke Fractures Medical conditions, including cardiac conditions, epilepsy, diabetes, asthma and other respiratory conditions No signs of life Poisoning and toxic substances (including chemical contamination) Respiratory distress/arrest Seizures Shock Stroke Substance misuse - common drugs and alcohol, including illicit drugs.
First aid management must take into account applicable aspects of:	The setting in which first aid is provided, including:

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	workplace policies and procedures industry/site specific regulations, codes etc. OHS requirements state and territory workplace health and safety legislative requirements location and nature of the incident situational risks associated with, for example, electrical and biological hazards, weather, motor vehicle accidents location of emergency services personnel. The use and availability of first aid equipment and resources Infection control Legal and social responsibilities of first aider
Resources and equipment are used appropriate to the risk to be met and may include:	AED First aid kit Auto-injector Puffer/inhaler Resuscitation mask or barrier Spacer device
Communication media and equipment may include but are not limited to:	Telephones, including landline, mobile and satellite phones HF/VHF radio Flags Flares Two way radio Email Electronic equipment Hand signals

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Appropriate clinical expert may include:	Supervisor/manager Ambulance officer/paramedic Other medical/health worker
Documentation may include:	Injury report forms Workplace documents as per organisation requirements
Documentation may include recording:	Time Location Description of injury First aid management Fluid intake/output, including fluid loss via: blood vomit faeces urine Administration of medication including: time date person administering dose Vital signs

Unit Sector(s)

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HLTFA402B Apply advanced first aid

Modification History

Unit Descriptor

This unit deals with the provision of advanced first aid response, life support, management of casualty(s), the incident and other first aiders, until the arrival of medical or other assistance, and provision of support to other providers

This unit builds on HLTFA301B: Apply first aid to include additional skills and use of a range of equipment

Application of the Unit

Training Package users should ensure implementation is consistent with any specific workplace and/or relevant legislative requirements in relation to first aid, including State/Territory requirements for currency

Application of these skills and knowledge should be contextualised as required to address specific industry, enterprise or workplace requirements and to address specific risks and hazards and associated injuries

Licensing/Regulatory Information

Pre-Requisites

Employability Skills Information

The required outcomes described in this unit of competency contain applicable facets of Employability Skills

The Employability Skills Summary of the qualification in which this unit of competency is packaged will assist in identifying Employability Skill requirements

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

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Elements and Performance Criteria

Elements and Performance Criteria

Element	Performance Criteria
1 Assess the situation	1.1 Identify, assess and minimise **hazards** that may pose a risk of injury or illness to self and others
	1.2 Assess **risks** to first aider and others and determine appropriate response to ensure prompt control of situation
	1.3 Ascertain and prioritise need(s) for emergency services/medical assistance and undertake triage where required
	1.4 Deploy **resources** to appropriate locations as required in line with workplace procedures
2 Manage the casualty(s)	2.1 Determine and explain the nature of **casualty's injury/condition** and relevant first aid procedures to provide comfort
	2.2 Respond to the casualty in a culturally aware, sensitive and respectful manner
	2.3 Seek consent for **management** of the casualty's injury/illness from person(s) where relevant
	2.4 Determine and implement welfare procedure according to casualty(s) needs
	2.5 Control effects of injury and determine and apply appropriate **first aid management** to meet the needs of the casualty and situation
	2.6 Assist with **self-medication** in accordance with State/Territory regulations, legislation and policies and manufacturer's/supplier's instructions and subject to casualty's regime
	2.7 Monitor **casualty's condition** and respond in a timely manner in accordance with effective first aid principles
	2.8 Correctly operate basic life support **equipment** where appropriate according to relevant legislation and manufacturer's/supplier's instructions

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		2.9 Apply safety procedures for operation of pressurised gases
		2.10 Use safe manual handling techniques
		2.11 Finalise **management** according to casualty's needs and first aid principles
3	Coordinate first aid activities until arrival of medical assistance	3.1 Identify available **resources** required and establish communication links with appropriate personnel, emergency management services and medical assistance as appropriate
		3.2 Deploy correct amount of **resources** to appropriate locations in an effective manner to ensure timely arrival of required resources
		3.3 Document the provision of resources and recommend modifications as required
		3.4 Monitor the condition of casualties in accordance with first aid principles and workplace procedures
		3.5 Coordinate evacuation of casualties according to relevant evacuation procedures
		3.6 Arrange support services for personnel involved in the incident in accordance with relevant principles and procedures
4	Communicate essential incident details	4.1 Maintain communication with relevant personnel using appropriate media and equipment
		4.2 Communicate first aid information with other providers/carers as appropriate to meet their needs and in accordance with workplace procedures
		4.3 Calmly provide information to reassure casualty, adopting a communication style to match the casualty's level of consciousness
		4.4 Prepare an incident report in line with organisation requirements
		4.5 Maintain confidentiality of records and information in line with privacy principles and statutory and/or organisation policies

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5 Evaluate the incident	5.1 Evaluate management of the incident and where required develop an action plan in consultation with relevant parties
	5.2 Participate in debriefing/evaluation in order to improve future operations and address individual's needs
	5.3 Formulate and review contingency planning to identify and select alternative management principles and procedures as required

Required Skills and Knowledge

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

Working knowledge of:

legal responsibilities and duty of care, including confidentiality

basic anatomy (skeleton, muscles, joints, bones), physiology and toxicology

ARC Guidelines and/or State/Territory regulations, legislation and policies relating to provision of first aid

procedures for dealing with major and minor accidents in the workplace

infection control principles and procedures, including using standard precautions

how to gain access to and interpret material safety data sheets (MSDSs)

company/organisation standard operating procedures (SOPs)

priorities of management in first aid

occupational health and safety requirements in the provision of first aid.

capabilities of emergency management services

first aiders' skills and limitations

safe storage and handling procedures for pressurised gases

advanced resuscitation techniques as per **HLTFA404A Apply advanced resuscitation techniques**

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First aid management procedures in accordance with ARC Guidelines, state/territory regulations, legislation and policies and organisation requirements for conditions identified in the Range Statement and including:

use of AED, oxygen, bronchodilator

spinal care

management of anaphylactic shock reaction

use of analgesic gases

Incident management procedures:

manual handling, hazardous substances, dangerous goods or chemicals

basic triage for a multiple casualty incident

safe access to the casualty

awareness of confined spaces and dangerous places

removal of casualty to safe area, if appropriate

coordinate activities of other first aiders, if applicable

First aid management procedures may also relate to emergency childbirth

Complications and associated methods of management for conditions identified in the Range Statement

State and territory regulatory requirements relating to currency of skill and knowledge

Social issues, especially in particular workplace or community context(s) in which first aid is to be applied, including:

importance of debriefing

need to be culturally aware, sensitive and respectful

confidentiality

own skills and limitations

Awareness of stress management techniques and available support

Safety procedures for the operation of pressurised gases

Essential skills:

Ability to:

Manage specific injuries/illnesses and conditions as identified in the Range Statement for

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this competency unit

Conduct an initial casualty assessment

Plan an appropriate first aid response in line with established first aid principles, policies and procedures, ARC Guidelines and/or State/Territory regulations, legislation and policies and industry requirements and respond appropriately to contingencies in line with own skills

Apply advanced resuscitation techniques as per **HLTFA404A Apply advanced resuscitation techniques**

Use a range of first aid equipment as outlined in the Range Statement

Demonstrate the application of first aid principles

Comply with OHS legislation

Provide assistance with self-medication as per subject's own medication regime and in line with State/Territory legislation, regulations and policies and any available medical/pharmaceutical instructions

Administer medication in line with State/Territory regulations, legislation and policies and any available medical/pharmaceutical instructions

Demonstrate:

safe manual handling

adequate infection control procedures

consideration of the welfare of the casualty

safe storage and handling procedures for pressurised gases

Prepare a written incident report or provide information to enable preparation of an incident report

Interpret and use listed documents

Communicate effectively and assertively and show leadership in an incident

Make prompt and appropriate decisions relating to managing an incident in the workplace

Use literacy and numeracy skills as required to read, interpret and apply guidelines and protocols

Call an ambulance and/or medical assistance according to relevant circumstances and report casualty's condition

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the

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Assessment Guidelines for this Training Package.

Critical aspects of assessment:	Assessment must include demonstrated evidence of specified Essential Knowledge and Essential Skills identified in this competency unit Competence should be demonstrated working individually and, where appropriate, as part of a first aid team Consistency of performance should be demonstrated over the required range of situations relevant to the workplace or community setting Currency of first aid knowledge and skills is to be demonstrated in line with state/territory regulations, legislation and policies, ARC and industry guidelines
Method of assessment may include:	Skills in performing first aid procedures are to be assessed through demonstration, with questioning to confirm essential knowledge Skills may be assessed through simulations, using anatomical models, manikins or in a high fidelity simulation centre For assessment purposes, demonstration of skills in CPR procedures requires using a model of the human body (resuscitation manikin) in line with ARC Guidelines
Access and equity considerations:	All workers in the health industry should be aware of access and equity issues in relation to their own area of work All workers should develop their ability to work in a culturally diverse environment In recognition of particular health issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on health of Aboriginal and Torres Strait Islander people

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	Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on health of Aboriginal and/or Torres Strait Islander clients and communities

Range Statement

RANGE STATEMENT

The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

Contextualisation to address specific requirements may include:	Focus on first aid management of specific types of injury First aid provision under specific constraints or circumstances (eg. in confined spaces, in maritime work environment or in work environment involving identified risks/hazards)
First aid management must take into account:	Workplace policies and procedures Industry/site specific regulations, codes etc. OHS requirements State and territory workplace health and safety requirements
A hazard is:	A source or situation with the potential for harm in terms of human injury or ill-health, damage to property, the environment, or a combination of these

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Hazards may include:	Physical hazards
	Biological hazards
	Chemical hazards
	Hazards associated with manual handling
Risks may include:	Risks from worksite equipment, machinery and substances
	Risks from first aid equipment (oxygen cylinders, AED)
	Environmental risks
	Exposure to blood and other body substances
	Risk of further injury to the casualty
	Risks associated with the proximity of other workers and bystanders
	Risks from vehicles
	Fallen power lines, step and touch potential
Casualty's condition is managed for:	Abdominal injuries
	Airway obstruction
	Allergic reactions
	Altered and loss of consciousness
	Bleeding
	Burns - thermal, chemical, friction, electrical
	Chest pain
	Injuries: cold and crush injuries; eye and ear injuries; head, neck and spinal injuries; minor skin injuries; needle stick injuries; soft tissue injuries including sprains, strains, dislocations
	Near drowning
	Envenomation - snake, spider, insect and marine bites
	Environmental conditions such as hypothermia, hyperthermia, dehydration, heat stroke

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	Fractures
	Medical conditions, including cardiac conditions, epilepsy, diabetes, asthma and other respiratory conditions
	No signs of life
	Pain relief
	Poisoning and toxic substances (including chemical contamination)
	Respiratory distress
	Shock
	Seizures
	Stroke
	Substance misuse - all drugs and alcohol, including illicit drugs
First Aid management skills must include in accordance with ARC Guidelines, **State/Territory regulations**, **legislation and policies and industry requirements**:	Administration of analgesia
	CPR
	Infection control
	AED
	Identification and management of anaphylactic shock reaction in accordance with ARC Guidelines, State/Territory regulations, legislation and policies and industry requirements
	Oxygen administration
First aid management must account for:	Location and nature of the workplace
	Environmental conditions eg electricity (high or low voltage), biological risks, weather, motor vehicle accidents
	Location of emergency services personnel
	Number of casualties and potential casualties
	Use and availability of first aid equipment, resources and pharmaceuticals
	Types of dangers/risks to the casualty and any others in the vicinity of the situation

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	Confined spaces, subject to industry need
Medications may include in accordance with ARC Guidelines, **State/Territory regulations**, **legislation and policies and industry requirements**:	Oxygen Analgesics Bronchodilators Casualty's own medications Auto-injectors
Resources and equipment are used appropriate to the risk to be met and may include:	Oxygen resuscitation/cylinders AED Thermometers Auto-injectors Back boards Stretchers Soft bag resuscitator First aid kit Casualty's medication Analgesic inhalers Analgesic gas equipment Resuscitation mask or barrier Spacer device Cervical collars
Information to be documented may include:	Time Location Description of injury First aid management Fluid intake/output, including fluid loss via: blood vomit faeces urine

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	Administration of medication including: time date person administering dose Vital signs
Established first aid principles include:	Checking the site for danger to self, the casualty and others and minimising the danger Checking and maintaining the casualty's airway, breathing and circulation

Unit Sector(s)

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HLTFA403A Manage first aid in the workplace

Modification History

Unit Descriptor

This unit addresses the establishment and maintenance of facilities to enable or facilitate the provision of appropriate first aid in the workplace

Application of the Unit

The skills and knowledge described in this competency unit are suitable for those in nominated workplace first aider roles

Training Package users should ensure implementation is consistent with any specific workplace and/or relevant legislative requirements in relation to OHS and provision of first aid

Application of these skills and knowledge should be contextualised as required to address specific industry, enterprise or workplace requirements and to address specific risks and hazards and associated injuries

Licensing/Regulatory Information

Pre-Requisites

Employability Skills Information

The required outcomes described in this unit of competency contain applicable facets of Employability Skills

The Employability Skills Summary of the qualification in which this unit of competency is packaged will assist in identifying Employability Skill requirements

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. Terms in italics are elaborated in the Range Statement.

Elements and Performance Criteria

Elements and Performance Criteria

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Element	Performance Criteria
1 Establish a workplace first aid facility	1.1 Plan a **first aid facility** in the workplace to address **workplace and legislative requirements**
	1.2 Identify potential **workplace hazards** and assess **associated risks** as a basis for determining **first aid resource** requirements
	1.3 Identify and prepare first aid equipment and resources required to address identified workplace requirements
	1.4 Identify personnel requirements in line with legislative and workplace requirements
	1.5 Establish and maintain links with relevant **first aid bodies and professional organisations** to maintain currency in the field and for referral purposes
	1.6 Access and provide information in the workplace to encourage risk minimisation and facilitate access to first aid facilities as appropriate
2 **Manage** a workplace first aid facility	2.1 Monitor and maintain availability of adequate resources to support workplace first aid response
	2.2 Conduct regular inspections of stock and equipment to ensure currency and operational readiness in line with workplace requirements
	2.3 Ensure equipment is recovered and reprocessed and that waste is disposed of safely according to legislative and workplace procedures
	2.4 Ensure equipment and resources are stored and maintained in line with relevant legislation and manufacturer's/supplier's instructions
	2.5 Contribute to the review of risks in the workplace and validation of organisation policies and procedures relating to the provision of first aid
	2.6 Contribute to planning for response to major workplace incidents
	2.7 Deploy appropriate equipment, resources and personnel to ensure timely and effective first aid

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		response in line with workplace requirements
		2.8 Use safe manual handling techniques
3	Manage workplace first aid records	3.1 Ensure **documentation** is completed as required according to legislation and workplace procedures
		3.2 Maintain first aid records in line with legislative requirements and workplace security practices
		3.3 Send relevant documents to appropriate bodies in line with workplace and legislative requirements
		3.4 Maintain confidentiality of records and information in line with privacy principles and statutory and/or organisation policies
4	Evaluate the provision of first aid in the workplace	4.1 Evaluate management of workplace incidents and develop an action plan in consultation with relevant parties to improve first aid response in the workplace if required
		4.2 Participate in debriefing/evaluation in order to improve future operations and address individual needs
		4.3 Ensure first aid response is provided in a culturally aware, sensitive and respectful manner
		4.4 Implement and evaluate workplace management procedures in accordance with risk assessment
		4.5 Formulate and review contingency planning to identify and select alternative management principles and procedures as required

Required Skills and Knowledge

This describes the essential skills and knowledge and their level required for this unit.

Essential knowledge:

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Working knowledge of:

Legal responsibilities and duty of care

Australian Resuscitation Council (ARC) Guidelines relating to provision of first aid

Procedures for dealing with major and minor accidents in the workplace

How to gain access to and interpret material safety data sheets (MSDSs)

Company/organisation standard operating procedures (SOPS)

Priorities of management in first aid

Occupational health and safety requirements in the provision of first aid

First aiders' skills and limitations in relation to first aid response in the workplace

First aid risk assessment practices and procedures

Safe storage and handling of medication in the workplace

First aid equipment and resources to manage injuries and illnesses addressed in HLTFA301B: Apply first aid and HLTFA402B: Apply advanced first aid

First aid management procedures for conditions identified in the Range Statement

Infection control principles and procedures, including using standard precautions

State/territory regulations, legislation and policies relating to:

workplace first aid provision

occupational health and safety requirements in the provision of first aid

first aid training

currency of first aid skills and knowledge

Stress management techniques and available support

Social issues, with particular reference to workplace culture, issues and resources and associated organisation requirements:

importance of first aid response to be culturally aware, sensitive and respectful

debriefing counselling procedures

consent and confidentiality

own skills and limitations

Essential skills:

Ability to:

Manage a first aid response in an identified workplace context

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Assess workplace first aid requirements

Maintain first aid equipment and resources in operational condition

Conduct an initial casualty assessment and prioritisation

Conduct/review first aid risk assessment

Plan an appropriate first aid response in line with established first aid principles, ARC Guidelines and/or State/Territory regulations, legislation and policies and respond appropriately to contingencies in line with own level of skills and knowledge

Apply first aid principles in the workplace

Implement OHS guidelines

Demonstrate:

safe manual handling

adequate infection control procedures - use of standard precautions

consideration of the welfare of casualties and first aiders

incident management skills

safe storage and handling procedures for pressurised gases

safe storage and handling of medication in the workplace

Interpret, use and maintain records of the range of documentation required by the workplace and regulatory authorities

Communicate effectively and assertively and show leadership in an incident

Use high level literacy and numeracy skills as required to read, interpret, address and communicate guidelines, protocols and reporting requirements

Make prompt and appropriate decisions relating to managing an incident in the workplace

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

Critical aspects of assessment:	Assessment must include demonstrated evidence of specified Essential Knowledge and Essential Skills identified in this competency unit Consistency of performance should be demonstrated over the required range of

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	situations relevant to the workplace Currency of first aid knowledge and skills is to be demonstrated in line with state/territory regulations, legislation and policies, ARC and industry guidelines
Interdependence of units:	Competence in this unit may be assessed individually or with other related competency units, such as: Occupational health and safety Risk assessment Emergency procedures
Access and equity considerations:	All workers in the health industry should be aware of access and equity issues in relation to their own area of work All workers should develop their ability to work in a culturally diverse environment In recognition of particular health issues facing Aboriginal and Torres Strait Islander communities, workers should be aware of cultural, historical and current issues impacting on health of Aboriginal and Torres Strait Islander people Assessors and trainers must take into account relevant access and equity issues, in particular relating to factors impacting on health of Aboriginal and/or Torres Strait Islander clients and communities

Range Statement

RANGE STATEMENT

The Range Statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Add any essential operating

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conditions that may be present with training and assessment depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts.

Workplace first aid facility may involve:	First aid room/clinic First aid kits suited to specific workplace needs First aid equipment and resources Availability of personnel trained to provide first aid
Workplace first aid management must take into account:	Workplace policies and procedures Industry/site specific regulations, codes Workplace OHS requirements State and territory workplace health and safety legislative requirements
Workplace and legislative requirements for a first aid facility include:	State/territory regulations, legislation and policies Specific industry requirements, regulations and/or OHS issues Specific hazards present in the workplace Number of employees in the workplace Number of different workplace sites/locations Proximity to local services, including doctors, hospital, ambulance and other emergency services
First aid resources may include but are not limited to:	**Non-consumables**: Equipment, such as: oxygen resuscitation/cylinders AED thermometers

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auto-injectors

back boards

stretchers

soft bag resuscitator

first aid kit

casualty's medication

analgesic inhalers

analgesic gas equipment

resuscitation mask or barrier

spacer device

cervical collars

Personal Protective Equipment

Relevant texts and documentation, such as:

Australian Resuscitation Council Guidelines

first aid principles, policies and procedures

reference materials including MSDSs, relevant Occupational Health and Safety Act and Regulations

first aid code of practice/compliance codes

workplace records and blanks

Communication systems and equipment

First aid resources may include but are not limited to:

Consumables:

First aid kits, including bandages, tape, scissors, splinter removers, antiseptic, eye management, disinfectants, resuscitation masks, emergency numbers and contacts, etc

Dressings

Ointments

Cold packs

Analgesics

Splints

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	Sharps disposal
	Bio-hazardous waste bags/bins
	Medical grade oxygen
	Bandages
	Medication
	Personal protective equipment
	Eye wash
	Disinfectants
	Bronchodilators
Workplace hazards and risks may include:	Hazards associated with workplace equipment, machinery, substances and processes
	Environmental risks
	Risks associated with first aid response involving:
	first aid equipment (oxygen cylinders, AED)
	exposure to blood and other body substances
	risk of further injury to the casualty
	risks associated with the proximity of other workers and bystanders
First aid bodies and professional organisations may include:	Australian Resuscitation Council (ARC)
	Support Groups
	Registered Providers/Authorities
	Emergency services
First aid management skills must include:	Administration of analgesic gases in accordance with ARC Guidelines, state/territory regulations, legislation and policies and industry requirements
	CPR
	Infection control
	AED (where available)

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First aid management must account for:	Location and nature of the workplace
	Environmental conditions e.g. electricity, biological risks, weather, motor vehicle accidents
	Location of emergency services personnel
	Number of casualties and potential casualties
	Use and availability of first aid equipment, resources and pharmaceuticals
	Types of dangers/risks to the casualty and any others in the vicinity of the situation
	Confined spaces, subject to industry need
Documentation may include:	Incident/injury reports
	Casualty history forms
	Disease notification
	Workcover forms
	Medication registers
	Workers' compensation
	Day book
	Pre-participation records (sport)
	Medical histories
	Management records
	Stock records
	Infection control records
	Training records
	First aid risk assessment

Unit Sector(s)

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ICAA5056B Prepare disaster recovery and contingency plans

Modification History

Not Applicable

Unit Descriptor

Unit descriptor	This unit defines the competency required to analyse the impact of the system on the organisation and carry out risk analysis, disaster recovery and contingency planning for the project. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Application of the Unit

Application of the unit	

Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Evaluate impact of system on business continuity	1.1. Identify ***business-critical functions*** and the security environment from ***documentation*** and from discussion with business area and ***project team*** 1.2. Identify critical data and ***software*** from ***documentation*** 1.3. Assess potential impact of business risk and ***threats*** on IT ***systems*** 1.4. Identify and evaluate ***statutory requirements***, ***commercial requirements*** and contingency possibilities according to specifications and cost ***constraints***
2. Evaluate threats to system	2.1. Identify ***threats*** to the ***system***, with consideration of security analysis and internal and external business environment 2.2. Evaluate risk minimisation alternatives against ***specifications*** and cost ***constraints***
3. Formulate prevention and recovery strategy	3.1. Evaluate prevention and recovery options to support critical business functions against business ***specifications*** and cost ***constraints*** 3.2. Review current operational procedures to ensure adequate risk safeguards and ***contingency plans*** are in place 3.3. Submit disaster recovery and prevention strategy to

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ELEMENT	PERFORMANCE CRITERIA
	appropriate person for approval
4. Develop disaster recovery plan to support strategy	4.1. Identify and document ***resources*** required for disaster recovery according to ***specifications*** and cost ***constraints*** 4.2. Identify and document processes required for disaster strategy according to project ***standards*** 4.3. Identify ***cut-over criteria*** before initiating disaster plan 4.4. Document disaster recovery plan and submit to ***appropriate person*** for review and sign-off

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- Logistic management skills for identified resources and procedures skills (e.g. when IT hardware, software and resources required for disaster recovery are identified and documented according to project specifications and cost constraints)
- Negotiation skills in relation to self and other team members and applied to a defined range of predictable problems (e.g. when business-critical functions are identified from project documentation and discussion with client business area and project team)
- Project planning skills in relation to scope, time, cost, quality, communications, risk analysis and management (e.g. when business-critical functions are identified from project documentation and discussion with client business area and project team, and when contingency possibilities are identified and evaluated according to project specifications and cost constraints)
- Research skills for specifying, analysing and evaluating broad features of a particular business domain and best practice in system development (e.g. when threats to the system are identified, taking into consideration security analysis and internal and external business environment)
- Facilitation and presentation skills in relation to transferring and collecting information and gaining consensus on concepts (e.g. when business-critical functions are identified from project documentation and discussion with client business area and project team, and when disaster recovery plan is documented and submitted to higher authorities for review and sign-off

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REQUIRED SKILLS AND KNOWLEDGE
Required knowledge
• Broad knowledge of basic engineering (e.g. when evaluating threats) • Broad knowledge of fire/safety knowledge (e.g. when formulating prevention and recovery strategy) • Detailed knowledge of back-up methodologies (e.g. when formulating prevention and recovery strategy) • Broad knowledge of systems engineering (e.g. when evaluating threats) • Specific components of the business planning process relevant to the development of IT business solutions (e.g. when evaluating impact of system on business continuity) • Broad knowledge of the client business domain (e.g. when evaluating impact of system on business continuity) • Detailed knowledge of the system's current functionality (e.g. when evaluating impact of system on business continuity)

Evidence Guide

EVIDENCE GUIDE	
The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • Assessment must confirm the ability to specify contingencies that minimise down time for business-critical functions. • Assessment must confirm the ability to clearly specify directions on how to handle serious down time. • Assessment must confirm the ability to coordinate, plan and articulate flexible logistics requirements. To demonstrate competency in this unit the learner will require access to: • A vulnerability assessment and general definition of

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EVIDENCE GUIDE	
	requirements • Business impact analysis • Acceptance test plan • Information technology security assurance specifications
Context of and specific resources for assessment	Assessment of this unit of competency could include review of the disaster recovery/contingency plan developed by the learner to ensure the following is covered: • Defined recovery requirements from the perspective of business functions • The impact of an extended loss on operations and key business functions • The contingency plan is understandable, easy to use and easy to maintain • Contingency planning considerations may be integrated into ongoing business planning and system development processes • The disaster recovery plan is not a one-off activity, but rather an ongoing process The plan should cover: • Physical security • System failure, accident, sabotage (hackers) • Denial of service • Virus attack • Telecommunications failure Disaster recover plans are critical for organisations that rely on IT for business operations. The breadth, depth and complexity covering planning and initiation of alternative approaches to skills or knowledge applications across a broad range of technical and/or management requirements, evaluation and coordination would be characteristic. Assessment must ensure: • The demonstration of competency may also require

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EVIDENCE GUIDE	
	self-directed application of knowledge and skills, with substantial depth in some areas where judgement is required in planning and selecting appropriate equipment, services and techniques for self and others. • Applications involve participation in development of strategic initiatives as well as personal responsibility and autonomy in performing complex technical operations or organising others. It may include participation in teams including teams concerned with planning and evaluation functions. Group or team coordination may also be involved.
Method of assessment	The purpose of this unit is to define the standard of performance to be achieved in the workplace. In undertaking training and assessment activities related to this unit, consideration should be given to the implementation of appropriate diversity and accessibility practices in order to accommodate people who may have special needs. Additional guidance on these and related matters is provided in ICA05 Section 1. • Competency in this unit should to be assessed using summative assessment to ensure consistency of performance in a range of contexts. This unit can be assessed either in the workplace or in a simulated environment. However, simulated activities must closely reflect the workplace to enable full demonstration of competency. • Assessment will usually include observation of real or simulated work processes and procedures and/or performance in a project context as well as questioning on underpinning knowledge and skills. The questioning of team members, supervisors, subordinates, peers and clients where appropriate may provide valuable input to the assessment process. The interdependence of units for assessment purposes may vary with the particular project or scenario.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

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EVIDENCE GUIDE	
	An individual demonstrating this competency would be able to: • Demonstrate understanding of a broad knowledge base incorporating theoretical concepts, with substantial depth in some areas • Analyse and plan approaches to technical problems or management requirements • Transfer and apply theoretical concepts and/or technical or creative skills to a range of situations • Evaluate information, using it to forecast for planning or research purposes • Take responsibility for own outputs in relation to broad quantity and quality parameters • Take some responsibility for the achievement of group outcomes • Maintain knowledge of industry products and services

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Business-critical functions may include but are not limited to:	• financial systems • customer service functions • payroll
Documentation may follow:	• ISO/IEC/AS standards • audit trails • naming standards • version control • project management templates and report writing • maintaining equipment inventory

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RANGE STATEMENT	
	• client training • satisfaction reports
Project team may include:	• solution developers and business clients working together • individual business analysts • a number of third-party solution developers working together • a number of different businesses working in partnership
Software may include but are not limited to:	• commercial • in-house • packaged or customised software
Specifications may include but are not limited to:	• technical requirements • user problem statement • current system functionality
Constraints may include but are not limited to:	• time • budget • resource • hardware • software • policy • legal constraints
System may include but are not limited to:	• databases • applications • servers • operating systems • gateways • application service provider • ISP
Appropriate person may include:	• supervisor • teacher • authorised business representative • client
Threats may include:	• Weather (storms, earthquake) • Security • Information technology failure (hardware, software) • Accident • Espionage • Sabotage (hackers)

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RANGE STATEMENT	
	• Telecommunications network failure • Denial of service • Virus attack Supplementary questioning of the client may be used during the assessment phase, where necessary, to ensure that all issues relating to threats to the system are considered and appropriate choices made given the need to prevent, limit, recover, respond and recover from disasters
Back-up strategy may include:	• hot standby site • warm standby site • cold standby site • mobile van • supplier • bureau • contacts through user group • third parties
Contingency plans will vary in format and content detail, but will typically:	• identify weaknesses and provide for the implementation of a disaster prevention program • minimise disruption to business operations • provide a coordinated approach to the disaster recovery process
Cut-over criteria may include:	• estimate of time before system is operational • estimate of business impact • authorisations to cut-over • actual system down time • refresher of cut-over plan
Security environment	• Includes legislation, organisational security policies, customs, expertise and knowledge that are, or may be, relevant. The security environment also includes the threats to security that are, or are held to be, present in the environment
Statutory requirements	• May include legislation (e.g. Privacy Act), industry-imposed controls and standards. In certain organisations (e.g. health and banking), there may be strict laws regarding confidentiality and reporting of data

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RANGE STATEMENT	
Commercial requirements	• Back-up • Storage and recovery of data • Access to internal network • Passwords/logons • Encryption • Firewalls • Hacking • Confidentiality • Integrity • Availability
Standards may include:	• ISO/IEC/AS standards • organisational standards • project standards (for further information refer to the Standards Australia website at: www.standards.com.au)

Unit Sector(s)

Unit sector	Analyse and Design

Co-requisite units

Co-requisite units		

Competency field

Competency field	

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ICAA6149B Implement quality assurance processes for business solutions

Modification History

Not Applicable

Unit Descriptor

Unit descriptor	This unit defines the competency required to define and implement quality assurance processes and procedures to ensure that business solutions achieve quality performance expectations. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Application of the Unit

Application of the unit	

Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Prerequisite units		

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Plan business quality assurance process	1.1. Determine business quality performance expectations and benchmark ***standards*** 1.2. Develop business ***standards*** and guidelines for achieving each benchmark 1.3. Allocate strategic quality responsibilities for meeting business ***standards*** and guidelines according to business procedures 1.4. Communicate quality policy and procedures to appropriate ***stakeholders*** 1.5. Document expectations, standards and benchmarks into a quality plan based on business ***documentation standards*** 1.6. Identify appropriate quality management systems guides, including ***quality management plan*** for complex activities
2. Implement quality policies and plans	2.1. Write quality policy for business directive 2.2. Create ***quality management plan*** for business process 2.3. Distribute ***quality management plan*** to key people for feedback 2.4. Analyse feedback to determine if corrective action needs to be taken

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ELEMENT	PERFORMANCE CRITERIA
	2.5. Make changes to ***quality management plan***, if required, to incorporate corrective action 2.6. Allocate key quality tasks and functions to ***appropriate*** person as per the ***quality management plan*** 2.7. Establish and document a quality reporting and monitoring program 2.8. Check and document skills of staff to ensure that they are able to meet the ***quality standards*** required
3. Control quality assurance processes	3.1. Implement quality performance guidelines, procedures and processes as per the ***quality management plan*** 3.2. Obtain stakeholder feedback, including ***client*** satisfaction to monitor implementation of quality processes 3.3. Monitor quality process performance as per the ***quality management plan*** 3.4. Report on monitoring of quality performance to key decision makers 3.5. Identify and record breakdowns in the ***system*** and create corrective action requests 3.6. Take immediate corrective action, where necessary
4. Improve quality	4.1. Collect, analyse and measure quality performance results against benchmarks to determine ***quality standards*** 4.2. Determine the frequency of quality breakdowns through corrective action requests in order to identify whether defects are isolated incidents or require a wider analysis and corrective action 4.3. Determine corrective actions to be taken and assign responsibility for taking the action where appropriate 4.4. Identify who will be responsible for quality improvement 4.5. Implement corrective action solutions and measure performance 4.6. Review and adjust benchmark ***standards*** periodically in order to improve quality performance 4.7. Document quality performance results and disseminate the information to ***stakeholders*** as appropriate 4.8. Review business procedures at predetermined schedules as part of a management review process

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ELEMENT	PERFORMANCE CRITERIA
	and quality reporting function

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• Website development • Website analysis and security auditing • Technical test design development • Testing implementation data • Testing evaluation data • Evaluating feedback from a variety of key stakeholders • Evaluation analysis
Required knowledge
• Website architecture, including operating system • Technical performance measurement • Business model understanding • Customer and business liaison • Website privacy, accessibility and equity legislation • ISO/IEC/AS standards • Copyright and intellectual property • Quality concepts • Quality improvement processes

Evidence Guide

EVIDENCE GUIDE
The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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EVIDENCE GUIDE	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • Assessment must confirm the competency to plan and implement appropriate processes and procedures that ensure that quality expectations are met. Standards should be quantitative and applied universally wherever possible. Quality assurance standards should be well documented and disseminated. To demonstrate competency in this unit the following resources will be needed: • Quality guidelines • Access to related quality standards • Data related to the business model
Context of and specific resources for assessment	Managing processes related to business involves analysis, documentation and process re-engineering across a broad range of technical and managerial functions, including identifying technical and human processes interactions. Contribution to the development of a broad quality plan is involved and accountability and responsibility for self and others in achieving the outcomes is expected. Implementing quality assurance processes involves significant judgement in planning, design, evaluation, technical or leadership/guidance and communications functions related to products, services, operations, processes and procedures. The degree of emphasis on breadth as against depth of knowledge and skills may vary. The breadth, depth and complexity involving analysis, design, planning, execution and evaluation across a range of technical and/or management functions including development of new criteria or applications or knowledge or procedures would be characteristic.

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EVIDENCE GUIDE	
	Assessment must ensure: • application of a significant range of fundamental principles and complex techniques across a wise and often unpredictable variety of contexts in relation to either varied or highly specific functions. Contribution to the development of a broad plan, budget or strategy may be involved and accountability and responsibility for self and others in achieving the outcomes may also be characteristic. • Applications involve significant judgement in planning, design, technical or leadership/guidance functions related to products, services, operations or procedures would be common.
Method of assessment	The purpose of this unit is to define the standard of performance to be achieved in the workplace. In undertaking training and assessment activities related to this unit, consideration should be given to the implementation of appropriate diversity and accessibility practices in order to accommodate people who may have special needs. Additional guidance on these and related matters is provided in ICA05 Section 1. • Competency in this unit should to be assessed using summative assessment to ensure consistency of performance in a range of contexts. This unit can be assessed either in the workplace or in a simulated environment. However, simulated activities must closely reflect the workplace to enable full demonstration of competency. • Assessment will usually include observation of real or simulated work processes and procedures and/or performance in a project context as well as questioning on underpinning knowledge and skills. The questioning of team members, supervisors, subordinates, peers and clients where appropriate may provide valuable input to the assessment process. The interdependence of units for assessment purposes may vary with the particular project or scenario.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended

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EVIDENCE GUIDE	
	An individual demonstrating this competency would be able to: • Provide clear concise plans for managing a quality process related to business • Demonstrate understanding of knowledge related to business processes and quality assurance • Analyse objective data related to business performance • Demonstrate a command of wide-ranging decision making skills related to improving business performance • Demonstrate accountability for personal outputs within broad parameters related to business • Demonstrate accountability for group outcomes within broad parameters • Manage and evaluate organisational performance in line with business key performance indicators • Demonstrate understanding of specialised knowledge with depth in some areas • Analyse, diagnose, design and execute judgement across a broad range of technical or management functions • Generate ideas through the analysis of information and concepts at an abstract level • Demonstrate a command of wide-ranging, highly specialised technical, creative or conceptual skills • Demonstrate accountability for personal outputs within broad parameters • Demonstrate accountability for personal and group outcomes within broad parameters

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work

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RANGE STATEMENT	
situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Quality standards may be specific to:	• organisational standards • international standards • national standards • internal or customer-supplied standards
Client may include but is not limited to:	• internal departments • external organisations • individual people • employees
Appropriate person may include:	• supervisor • teacher • authorised business representative • client
System	• databases • applications • servers • operating systems • gateways • ASP • ISP
Stakeholders may include but is not limited to:	• end user • internal or external client • government body • corporate body • community groups
Documentation standards	• May include but are not limited to policy relating to sign-off, storage, distribution, revision • Standards may include ISO/IEC/AS standards, organisational standards, project standards (for further information refer to the Standards Australia website at: www.standards.com.au) • May include tools for documenting (e.g. word processing packages, desktop publishing packages)
Quality management plan may include:	• Processes • authorisations and responsibilities for quality control • quality assurance

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RANGE STATEMENT	
	• continuous improvement • communications and responsibilities • may contain critical success factors, measurement criteria and inspection, audit, report and review procedures
Standards may include:	• ISO/IEC/AS standards • organisational standards • project standards (for further information refer to the Standards Australia website at: www.standards.com.au)

Unit Sector(s)

Unit sector	Analyse and Design

Co-requisite units

Co-requisite units		

Competency field

Competency field	

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ICAICT103A Use, communicate and search securely on the internet

Modification History

Version	Comments
ICAICT103A	This version first released with *ICA11 Information and Communications Technology Training Package version 1.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to connect to the internet, securely send and receive emails, search the internet using web browsers and interact securely and in a socially responsible manner with a range of different internet sites.

Application of the Unit

This unit applies to individuals who use business technology to perform a range of routine tasks in the workplace or home office. They use fundamental knowledge of internet connection requirements, email and web browsers to perform tasks under direct supervision or with limited responsibility.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement but users should confirm requirements with the relevant federal, state or territory authority.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria

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Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Connect to and access the internet	1.1 Connect to the internet through the existing ***internet connection*** and confirm functionality 1.2 Open an ***internet browser*** and set a home page of personal choice by setting ***internet options*** 1.3 Ensure internet ***browser software security*** 1.4 Adjust the display of the internet browser to suit personal requirements 1.5 Modify toolbar to meet user and internet browser needs 1.6 Access a particular website, note privacy and other conditions of use and retrieve data 1.7 Use ***socially responsible behaviour*** when sharing information on the internet 1.8 Enter uniform resource locator (URL) in address line of internet browser
2. Use email for communications	2.1 Open email application package, create new email message and add addressees 2.2 Compose the text of an email message according to ***organisational guidelines*** and spell check and edit text as required 2.3 Create and add an automatic signature for the user 2.4 Attach ***files*** to the email message where required 2.5 Determine and set a priority and send the email message 2.6 Reply to and forward a received message using available features 2.7 Open and save an attachment to the relevant folder

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	2.8 Search for, sort and save email message using available settings 2.9 Adjust email accounts to restrict and quarantine possible ***email security*** problems 2.10 Print an email message as required
3. Search the internet	3.1 Review organisational guidelines on internet access 3.2 Open an internet application and locate and access a ***search engine*** on the internet and define search expressions based on the data required 3.3 Enter appropriate key words into the search engine to locate the desired information 3.4 Refine a search depending on outcomes of the original search 3.5 Save search expression results and present them in a report according to the information requirements 3.6 Create a bookmark within the internet browser or a link for the required web page for the key results 3.7 Save the key results in a bookmark folder 3.8 Modify the internet browser options for printing and print a web page 3.9 Close the internet browser
4. Access and use consumer-specific sites on the internet	4.1 Identify, access and review information-specific sites to gain consumer information 4.2 Identify and use ***internet application sites*** to lodge details and gain access and information 4.3 Access and use online forms on the internet
5. Undertake online transactions	5.1 Access an online transaction site 5.2 Ensure security of transaction site 5.3 Enter required information into fields on merchant's website 5.4 Ensure that pop-up dialog boxes, prompts or feedback mechanisms are completed

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	5.5 Enter, check and make changes to preferred ***transaction options***
	5.6 Complete online transaction
	5.7 Record and archive receipts according to business processes
	5.8 Close down and leave transaction process
6. Conduct an advanced search	6.1 Use search tools and advanced search features
	6.2 Use ***Boolean search*** techniques when required to enhance the search
	6.3 Use multiple or meta-search tools with a range of key words
	6.4 Use search engines particular to a field of knowledge to refine the outcome
	6.5 Access related virtual community sites and newsgroups and note their objectives and operational arrangements
	6.6 Conduct a search with domain names to refine the search
7. Use information that has been located	7.1 Cross-reference information found by using several websites to determine accuracy of information obtained
	7.2 Check date that website was last updated or properties of website to determine currency of information
	7.3 Determine website authority by looking at copyright statements, privacy statements and organisational information
	7.4 Save and print information found in different file forms

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - communicate with peers and supervisors
  - seek assistance and expert advice
  - undertake online transactions

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- literacy skills to:
  - compose email messages
  - interpret user manuals and help functions
  - read and interpret basic online documents
  - read and write basic workplace documents
- problem-solving skills to address common operational problems when using web browsers
- research skills to locate varied sources of information online
- technical skills to use:
  - digital device
  - email applications
  - internet search functions
  - peripheral hardware
  - keyboard to enter text into web browsers and email applications.

Required knowledge

- basic technical terminology related to reading help files and prompts
- basic knowledge of copyright and privacy statements
- different types of messages that occur, such as:
  - error messages
  - message to install plug-ins
- different types of search engines
- procedures for using email applications
- procedures for evaluating and assessing the authority, reliability and authenticity of information
- internet search functions
- internet speed, traffic loads related to times of accessing the internet
- internet web browsers
- makeup and structure of internet addresses
- organisational guidelines on internet and email use (web etiquette or netiquette)
- different internet search techniques
- web browser update techniques
- use of key words and bookmarks.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

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Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • connect to and access the internet • send and receive emails • secure internet access and email communications • use search tools to locate information • research and select appropriate website • undertake online interactions • make an informed assessment of the accuracy, currency, authority and reliability of the site and information located.
Context of and specific resources for assessment	Assessment must ensure access to: • use of PC or digital device with internet • search engines currently used in industry • organisational policies on internet usage • appropriate learning and assessment support when required. Where applicable, physical resources should include equipment modified for people with special needs.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • verbal or written questioning to assess candidate's knowledge of internet access requirements, email features and search engine attributes • direct observation of candidate accessing the internet, using email, and searching and interacting with consumer sites using advanced search features • direct observation of candidate undertaking online interactions • review of search results, including assessment of the accuracy, currency and reliability of the site and information located.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, where appropriate. Assessment processes and techniques must be culturally appropriate, and suitable to the communication skill level, language, literacy and numeracy capacity of the candidate and the work being performed. Indigenous people and other people from a non-English speaking background may need additional support. In cases where practical assessment is used it should be combined with targeted questioning to assess required knowledge.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Internet connection may include:	• 3G or high-speed downlink packet access (HSDPA) cellular network • 4G cellular network • broadband • cable • dial-up • digital subscriber line (DSL) • fibre to the 'x' (FTTx) • high-speed digital subscriber line (HSDSL) • integrated services digital network (ISDN) network terminating unit (NTU) • satellite • wireless modem • worldwide interoperability for microwave access (WiMAX).
Internet browser may include:	• Firefox • Galleon • Google Chrome • Internet Explorer • Konqueror • Lynx • Mozilla • Netscape Navigator • Opera • Phoenix.

Internet options may include:	• configuring:
	  • history
	  • home page
	  • location of temporary files
	  • privacy level
	  • security level
	  • type of connection.

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Browser software security may include:	• application enabling • cookie handling • pop-up blocking • privacy levels • security zones • trusted sites.
Socially responsible behaviour may relate to:	• not using obscene, profane, lewd, vulgar, rude, inflammatory or threatening language • not publishing information that, if acted upon, could cause damage to property or persons, nor publish deliberately false or defamatory information about a person or organisation • not engaging in personal attacks, including prejudicial or discriminatory attacks, not harass (distress or annoy) another person • not accessing material that is profane, obscene, pornographic or paedophilic, that promotes illegal acts, or that advocates violence or discrimination • not sending inappropriate emails • taking responsibility for protecting personal information by not revealing personal information, including names, addresses, photographs, credit card details and telephone numbers.
Organisational guidelines may include:	• content of emails • downloading information and accessing particular websites • opening mail with attachments • personal use of emails and internet access • virus risk (MS Windows OS and Mac OS only).
Files may include:	• email messages • HTML pages • music • PDF files • pictures • text files.

Email security may relate to:	• taking steps to restrict:
	  • malware
	  • phishing
	  • spam.

Search engine may include:	• Alexa Internet • AllTheWeb • AltaVista

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	• Bing • Cuil • Excite • Galaxy • GigaBlast • Go.com • Google • HotBot • Live Search • Lycos • search.AOL • specific search engines • Yahoo.

Internet application sites may include:	• consumer:
	  • banking
	  • shopping
	• education and training
	• government
	• health
	• interest groups
	• news
	• travel.

Transaction options may include:	• currency • delivery address • freight • invoice address.
Boolean search may include terms:	• AND • OR • NOT • NAND • NOR • NE • GE • LE • GT • LT.

Unit Sector(s)

General ICT

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Custom Content Section

Not applicable.

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ICAICT203A Operate application software packages

Modification History

Version	Comments
ICAICT203A	This version first released with *ICA11 Information and Communications Technology Training Package version 1.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to identify, select and operate three commercial software packages, including a word-processing and a spreadsheet application package.

The unit identifies the requirement to use a word-processing, spreadsheet and third software application package to ensure that the individual develops the skills required to cover a range of basic office software requirements.

Application of the Unit

This unit applies to information and communications technology (ICT) personnel who need to use several different software applications to produce diverse documents within a small to large office environment.

The ability to use and present a variety of key software application packages is a key component of any ICT business or office environment.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement but users should confirm requirements with the relevant federal, state or territory authority.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Element	**Performance Criteria**
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Use appropriate OHS office work practices	1.1 Use safe work practices to ensure ***ergonomic, work organisation, energy and resource conservation requirements*** are addressed 1.2 Use wrist rests and document holders where appropriate 1.3 Use monitor anti-glare and radiation reduction screens where appropriate
2. Use appropriate word-processing software	2.1 Select ***word-processing software*** appropriate to perform activity 2.2 Identify ***document*** purpose, audience and presentation requirements, and clarify with personnel as required 2.3 Identify ***organisational requirements*** for text-based business documents and design ***document structure and layout*** to ensure consistency of style and image 2.4 Match document requirements with software functions to provide efficient production of documents 2.5 Use ***technical functions, other data and formatting*** to finalise documents 2.6 Ensure the ***naming and storing of documents*** in appropriate directories or folders and the ***printing*** of documents to the required specifications
3. Use appropriate spreadsheet software	3.1 Select ***spreadsheet software*** appropriate to perform activity 3.2 Identify document purpose, audience and presentation requirements, and clarify with personnel as required

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	3.3 Enter ***simple formulas and functions*** using cell referencing where required 3.4 Customise ***spreadsheet settings*** to meet requirements 3.5 Ensure the naming and storing of documents in appropriate directories or folders and the printing of documents to the required specifications
4. Use a third application software package	4.1 Select ***software application package*** appropriate to perform activity 4.2 Identify purpose, audience and presentation requirements, and clarify with personnel as required 4.3 Use ***technical functions***, other data and formatting to finalise documents 4.4 Ensure documents are named and stored in appropriate directories or folders and printed to required specifications

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - communicate with peers and supervisors
  - seek assistance and expert advice
- literacy skills to:
  - interpret user manuals and help functions
  - read and write basic workplace documents
- numeracy skills to enter simple formulas into spreadsheet
- problem-solving skills to manage applications and use help functions
- technical skills to:
  - operate a personal computer (PC) and printer
  - operate a keyboard to enter text and numerical data
  - use application software packages.

Required knowledge

- application software packages used by the organisation
- basic technical terminology related to reading help files and responding to system help prompts

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- basic knowledge of system usage
- current business practices related to using software to prepare reports
- features and functions of commercial computing packages
- import and export software functions
- linking documents
- OHS principles and responsibilities for ergonomics, such as work periods and breaks
- purpose, use and functions of applications
- use of input and output devices.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • produce workplace documents using a minimum of three different software application packages • open, amend and save files and documents according to organisational requirements • use OHS principles and responsibilities for ergonomics, such as work periods and breaks • use help manuals and online help.
Context of and specific resources for assessment	Assessment must ensure access to: • use of PC and printer • use of software currently used in industry • documents detailing organisational style guide and policy • documents or information containing data suitable for developing software application documents • appropriate learning and assessment when required. Where applicable, physical resources should include equipment modified for people with special needs.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • verbal or written questioning to assess candidate's knowledge of OHS, application usage for specific

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	tasks, and use of different application functions • direct observation of candidate using a minimum of three different software applications • review of workplace documents prepared by candidate demonstrating a wide range of features from different software application packages.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, where appropriate. Assessment processes and techniques must be culturally appropriate, and suitable to the communication skill level, language, literacy and numeracy capacity of the candidate and the work being performed. Indigenous people and other people from a non-English speaking background may need additional support. In cases where practical assessment is used it should be combined with targeted questioning to assess required knowledge.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Ergonomic, work organisation, energy and resource conservation requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • equipment that is reasonably adjusted to meet personal needs, in appropriate circumstances • exercise breaks • footrest • keyboard and mouse position • lighting • mix of repetitive and other activities • noise minimisation • posture • rest periods

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	• screen position • workstation height and layout.
Word-processing software may include:	• Apple iWork • Microsoft Word • Open Office.
Document may include:	• captions • different odd and even pages • document protection • drawing • hyperlinks • linked and embedded objects • mail-merge data documents • master documents • MS WordArt • templates.
Organisational requirements may include:	• company colour scheme • company logo • consistent corporate image • content restrictions • established guidelines and procedures for document production • house styles • observing copyright legislation • organisation name, time, date, document title and filename in header or footer • templates.
Document structure and layout may include:	• annotated references • borders • boxes • bullet or number lists • captions • colour • columns • consistency with other business documents • cropping • drawing • footnotes • endnotes • graphics • headings • indentations • layout

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	• page numbers • position related to other text • size • spacings • typeface styles and point size.
Technical functions, other data and formatting may include:	• alignment • clip art • comments • data from other software applications • digital photographs • digital signatures • display features • embedding • exporting • fields • fills or shading • formulas • graphics • importing • lines and borders • linking • merge cells • page and section breaks • permissions • reviewing • sharing • sort criteria • sorting contents • split cell • table of contents • templates • text direction • versioning.
Naming and storing documents may include:	• authorised access • filenames according to organisational procedure • filenames that are easily identifiable related to the content • file or directory names which identify the operator, author, section and date • filing locations • organisational policy for backing up files and filing hard copies of documents

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	• security
	• storage in folders and sub-folders
	• storage on:
	  • hard disk drives
	  • CD-ROM
	  • tape backup.

Printing may include:	• comments • drawing objects • field codes • hidden text • print merge • print to file • to fit a specific number of pages.
Spreadsheet software may include:	• Apple iWorks, such as Numbers • Gnumeric • Microsoft Excel • Open Office.
Simple formulas and functions may include:	• addition • conditional logic • conditional summation • division • lookup • multiplication • subtraction • summation • application of the above to a series of cells.
Spreadsheet settings may include:	• cell alignment • charts • font settings • formatting tools • graphics • objects • page layout • print • share • simple formulas and functions • sort • toolbars • views • worksheets.
Software application	• database

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package may include:	• email • graphics • spreadsheet • word processing.
Technical functions may include:	• animations • arranging slides • charts • customising masters • illustrations • linking content • sharing • SmartArt • tables.

Unit Sector(s)

General ICT

Custom Content Section

Not applicable.

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ICAICT209A Interact with ICT clients

Modification History

Version	Comments
ICAICT209A	This version first released with *ICA11 Information and Communications Technology Training Package version 1.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to provide routine information and communications technology (ICT) client support in a professional manner.

Application of the Unit

This unit applies to frontline technical support personnel who interact with clients in an ICT support role. Communicating effectively and simplifying technical problems are key components of client support roles.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement but users should confirm requirements with the relevant federal, state or territory authority.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised*

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Element	Performance Criteria
unit of competency.	*text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Deliver support to ICT clients	1.1 Provide support for ***ICT clients*** in a courteous and professional manner according to organisational policy 1.2 Establish and confirm nature of ***client's*** ICT concerns using active listening and questioning 1.3 Maintain ***client*** contact and provide progress information until the problem is resolved
2. Respond to ICT client complaints	2.1 Respond to ICT clients concerns and issues demonstrating a positive, sensitive and helpful attitude 2.2 Escalate and refer ***client*** concerns to ***support person*** if required, explaining the nature of issues involved 2.3 Resolve ICT ***client*** complaint using recommendations from the ***support person*** 2.4 Document and record ICT ***client*** concerns and solutions, according to ***organisational guidelines***
3. Evaluate received ICT client complaints	3.1 Analyse recent ICT register 3.2 Propose proactive training to appropriate person

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communications skills to:
  - establish and confirm nature of client concerns
  - liaise with clients and ICT support
  - respond to clients from diverse cultural and other backgrounds
- customer-service skills to provide support for clients in a courteous and professional manner

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- decision-making skills applied to a limited range of options
- problem-solving skills to resolve client complaints.

Required knowledge

- current industry-accepted hardware and software products, with broad knowledge of general features and capabilities
- general knowledge of the ICT client business domain and business-critical functions
- general knowledge of organisational systems and working environment
- organisational policies for external and internal client contact.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of ability to: • provide routine ICT client support in a professional manner • refer client concerns to support person if required, according to escalation procedures • resolve client complaints • document and record client concerns and solutions, according to organisational guidelines.
Context of and specific resources for assessment	Assessment must ensure access to: • personal computer • relevant organisational guidelines • relevant documentation • site where routine ICT client support may be demonstrated • appropriate learning and assessment support when required. Where applicable, physical resources should include equipment modified for people with special needs.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct observation of candidate interacting with and providing support for clients • direct observation of candidate escalating client concerns to

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	support person • verbal or written questioning to assess candidate's knowledge of enterprise escalation procedures • review of documentation of client concerns and solutions.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, where appropriate. Assessment processes and techniques must be culturally appropriate, and suitable to the communication skill level, language, literacy and numeracy capacity of the candidate and the work being performed. Indigenous people and other people from a non-English speaking background may need additional support. In cases where practical assessment is used it should be combined with targeted questioning to assess required knowledge.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

ICT clients may include:	• external organisations • ICT administrators • ICT users • individuals • internal departments • vendors.
Support person may include:	• help-desk person • subject matter expert • supervisor • vendor business representative.
Organisational guidelines may include:	• access to software • communication methods • content of emails • dispute resolution • document procedures and templates

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	• downloading information and accessing particular websites • financial control mechanisms • opening mail with attachments • personal use of emails and internet access • virus risk.

Unit Sector(s)

General ICT

Custom Content Section

Not applicable.

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ICASAS204A Record client support requirements

Modification History

Version	Comments
Release 1	This version first released with *ICA11 Information and Communications Technology Training Package version 1.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to record, prioritise and escalate client support requests.

Application of the Unit

This unit applies to frontline technical support personnel who provide information and communications technology (ICT) client support in a small or large office environment. Communicating effectively and simplifying technical problems are key components of client support roles.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement but users should confirm requirements with the relevant federal, state or territory authority.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

ELEMENT	PERFORMANCE CRITERIA
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.*

Elements and Performance Criteria

1. Log requests for support	1.1 Record ***client*** support requests and requirements according to ***organisational standards***
	1.2 Review ***client*** support history and details
	1.3 Check the information and request for accuracy and urgency according to ***organisational standards***
2. Prioritise support requests with appropriate personnel	2.1 Identify guidelines for prioritising or rating ***client*** requests
	2.2 Prioritise ***client*** request based on its criticality or effect on business
3. Record support request	3.1 Document support request according to organisational requirements
	3.2 Refer requests to ***appropriate person*** or department for assistance

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
- gather client information
- clarify client requirements
- conflict-resolution skills and customer-service skills to deal with requests for support
- literacy skills to interpret general workplace documentation
- planning and organisational skills to prioritise work requests

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Required knowledge

- broad knowledge of:
- diagnostic tools
- escalation procedures
- maintenance procedures
- business scheduling requirements
- current business practices to prepare reports
- organisational procedures to rate and prioritise client requests
- roles and responsibilities of information technology (IT) division

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • log and record calls according to organisational policy and procedures • prioritise and escalate client support requests according to organisational policy and procedures.

Context of and specific resources for assessment	Assessment must ensure access to:
	• a site where logging and recording of client support may be recorded and prioritised
	• c***lient*** support history records
	• organisational policy and procedures related to:
	  • critical process
	  • escalation procedures
	  • logging procedures
	  • prioritising client requests
	• appropriate learning and assessment support when required.
	
	Where applicable, physical resources should include equipment

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	modified for people with special needs.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct observation of candidate logging and recording calls • review of reports completed as part of client history • verbal or written questioning of candidate's ability to communicate with appropriate persons involved with ***client*** support.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, where appropriate. Assessment processes and techniques must be culturally appropriate, and suitable to the communication skill level, language, literacy and numeracy capacity of the candidate and the work being performed. Indigenous people and other people from a non-English speaking background may need additional support. In cases where practical assessment is used it should be combined with targeted questioning to assess required knowledge.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Client may include:	• external organisations • individuals • internal departments.
Organisational standards may include:	• client liaison policy • escalation procedures • logged call procedures • preventative maintenance and diagnostic policy • roles and technical responsibilities in the IT department • security procedures • vendor and product service level support agreements.
Appropriate person may include:	• help-desk person • subject matter expert • supervisor • vendor business representative.

Unit Sector(s)

Systems administration and support

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ICASAS305A Provide IT advice to clients

Modification History

Version	Comments
ICASAS305A	This version first released with *ICA11 Information and Communications Technology Training Package version 1.0*

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to provide IT advice and support to clients, including the communication of comprehensive technical information.

Application of the Unit

This unit applies to frontline technical support personnel responsible for providing technical support explained in terms that a user can understand.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement but users should confirm requirements with the relevant federal, state or territory authority.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Element	Performance Criteria
Elements describe the essential outcomes of a unit of competency.	*Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills*

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Element	Performance Criteria
	and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

1. Review client support issues	1.1 Check for new problems logged by client 1.2 Check previous logs for similar problems or requests from client 1.3 Investigate and document the support issues affecting the client 1.4 Notify client of the results of ***investigation*** and provide ***advice and support*** on findings 1.5 Obtain client feedback and make changes
2. Provide advice on software, hardware or network	2.1 Confirm software, hardware or network requirements with client 2.2 Investigate and document a ***solution*** 2.3 Document additional requirements identified in the investigation and refer them to the client 2.4 Obtain approval from the client to implement the solution 2.5 Investigate and document the amount of technical support the client may require 2.6 Discuss and agree the level of technical support identified with the client 2.7 Arrange a time with the client when support will take place 2.8 Provide technical support as part of group or one-to-one instruction to the client 2.9 Provide manuals and help ***documentation*** to the client
3. Obtain client feedback	3.1 Create an appropriate evaluation or feedback form or other mechanism to gather feedback about the solution and support provided 3.2 Provide client with instructions on how to complete the form or use other means of providing feedback 3.3 Distribute the evaluation or feedback to the client 3.4 Review the feedback from the client to identify areas for improvement

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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- analytical skills to review client requirements and provide advice and support on findings
- communication skills to:
  - convey and clarify complex information
  - investigate and assess client needs
  - provide one-to-one instruction to client
- customer-service skills to communicate with clients in a range of contexts at various levels
- literacy skills to:
  - develop reports
  - document:
    - additional requirements
    - amount of technical support the client may require
    - solutions
    - support issues affecting the client
  - interpret technical manuals
- technical communication skills to write macros and templates.

Required knowledge

- available in-house and vendor support
- contract and service agreements with vendors
- features of different types of hardware supported by the organisation
- information sources
- operating system (OS):
  - functions and basic features
  - supported by the organisation
- security and network guidelines and procedures
- software:
  - advanced features
  - functions
  - supported by the organisation.

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Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • investigate client support requests and provide a documented solution after consultation with client • convey comprehensive technical information to clients in a clear, concise, jargon-free and coherent manner • access technical manuals and 'help' documentation.
Context of and specific resources for assessment	Assessment must ensure access to: • sites, peers and supervisors for obtaining information • software, hardware and networks • help-desk repository, technical records and documentation • appropriate learning and assessment support when required • modified equipment for people with special needs.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • direct observation of candidate investigating and providing advice and support on findings • review of candidate's documented investigation and solution • evaluation of client feedback.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, where appropriate. Assessment processes and techniques must be culturally appropriate, and suitable to the communication skill level, language, literacy and numeracy capacity of the candidate and the work being performed. Indigenous people and other people from a non-English speaking background may need additional support. In cases where practical assessment is used it should be combined with targeted questioning to assess required knowledge.

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Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Client may include:	• employee • external organisation • individual • internal department.
Investigation may include:	• active listening to clients and colleagues • contacting vendor or maintenance organisations • on-site examination • questions and answers • reviewing technical advice about the organisation.

Advice and support may include:	• hardware supported by the organisation:
	  • CD or DVD drives
	  • laptops
	  • notebooks
	  • printers
	  • reconfiguration of settings
	  • scanners
	  • screens
	• identification of training needs for referral to supervisor
	• manuals
	• one-to-one training
	• provision of client documentation
	• software supported by the organisation:
	  • creation of templates
	  • generation of a complex report on a database
	  • password and log-on procedure
	  • statistical functions of spreadsheets
	  • use of macros
	• vendor documentation.

Solution may include:	• hardware:
	  • new
	  • upgrade
	• implementing a new system

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	• software:
	  • new
	  • upgrade
	• user training.

Documentation may include:	• additional support requirements • amount of technical support the client requires • client support solutions • collection of records for computer program, OS or hardware device • support issues affecting the client.

Unit Sector(s)

Systems administration and support

Custom Content Section

Not applicable.

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ICAU1133B Send and retrieve information using web browsers and email

Modification History

Not Applicable

Unit Descriptor

Unit descriptor	This unit defines the competency required to complete basic internet search tasks as well as send and receive emails with attachments. The following units are linked and form an appropriate cluster: • ICAS1193B Connect a workstation to the internet • ICAU1128B Operate a personal computer • ICAU1129B Operate a word processing application • ICAU1213B Conduct on line transactions • ICAS2243B Detect and protect from spam and destructive software No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Application of the Unit

Application of the unit	

Licensing/Regulatory Information

Refer to Unit Descriptor

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Access the internet	1.1. Open an ***internet browser*** and set a home page of personal choice by setting ***internet options*** 1.2. Adjust the display of the ***internet browser*** to suit personal requirements 1.3. Modify ***toolbar*** to meet user and ***internet browser*** needs 1.4. Access a particular website, note privacy and other conditions of use and retrieve data 1.5. Enter a uniform resource locator (URL), in the address line of the ***internet browser***
2. Search the internet	2.1. Locate and select appropriate ***search engine*** and define search expressions based on the data required

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ELEMENT	PERFORMANCE CRITERIA
	2.2. Save search expression results and present them in a report according to the information requirements 2.3. Create a bookmark within the ***internet browser*** or a link for the required web page and save it in a bookmark folder 2.4. Modify the ***internet browser*** options for printing and print a web page 2.5. Close the internet browser
3. Research and apply 'netiquette' principles	3.1. Select ***search engine*** and using key word search research the concept of ***netiquette*** (or web etiquette) 3.2. Review rules of good online manners from at least two ***netiquette*** sites 3.3. Develop a personal list of ***netiquette*** principles to be applied to email and newsgroup discussions 3.4. Check that these are consistent with organisational policies
4. Send and organise messages	4.1. Open an email application package and create a new email message 4.2. Add addressee to the email message 4.3. Compose the text of an email message according to organisational guidelines 4.4. Create and add an automatic signature for the user, so that it appears automatically in every new email message that the user creates 4.5. Attach ***files*** to the email message, using the attachment feature 4.6. Determine and set a priority for an email message and spell check and edit text as required 4.7. Send the email message 4.8. Reply to received messages and forward as appropriate, using the carbon copy and forward features 4.9. Open and save an attachment to the relevant folder 4.10. Search for an email message and set a priority setting or delete as necessary 4.11. Sort inbox according to sender's name and date received 4.12. Save email messages in a folder 4.13. Compact folder to save space 4.14. Print an email message
5. Create an address	5.1. Manually add an email address to the email package

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ELEMENT	PERFORMANCE CRITERIA
book	address book 5.2. Update the address book by transferring the email address from a received message 5.3. Create a distribution list and send out email message

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• Ability to implement workstation adjustment according to OH&S guidelines • Basic analysis in relation to a limited range of routine tasks • Low-level decision making in relation to a limited range of routine tasks • Problem solving skills in known areas during normal routine activities • Reading and writing at a level where basic workplace documents are understood • Clear and precise communication • Ability to interpret user manuals • Using a PC and peripherals • Cultural understanding
Required knowledge
• Makeup and structure of an internet addresses • Basic technical terminology in relation to reading help files and prompts • Log-on procedures for accessing a PC • Modem speed, traffic loads in relation to times of accessing the internet • Evaluating and assessing the authority, reliability and authenticity of information • Organisational guidelines on internet and email usage ('web etiquette' or netiquette) • Different types of search engines (eg. Google, Alta Vista, Infoseek) • Different types of messages that occur (e.g. error messages, updates, need for installing plug-ins)

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Evidence Guide

EVIDENCE GUIDE	
The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • Assessment must confirm the ability to browse the internet, search for information, send and receive emails and organise the email client application on the computer. To demonstrate competency in this unit the person will require access to: • Organisational style guide/policy • Organisational policies on internet and email usage • Personal computer with internet capability
Context of and specific resources for assessment	This competency provides one of the fundamental foundation skills for interacting online. In this context, individuals must recognise their own responsibility in having access to the vast services, sites, systems and people provided by the internet. The breadth, depth and complexity of knowledge and skills in this competency would prepare a person to perform a defined range of activities many of which may be routine and predictable. Assessment must ensure • Applications may include a variety of employment related skills including preparatory access and participation skills, broad-based induction skills and/or specific workplace skills. They may also include participation in a team or work group.
Method of assessment	The purpose of this unit is to define the standard of performance to be achieved in the workplace. In undertaking training and assessment activities related to this unit, consideration should be given to the implementation of appropriate diversity and accessibility

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	practices in order to accommodate people who may have special needs. Additional guidance on these and related matters is provided in ICA05 Section 1. • Competency in this unit should be assessed using summative assessment to ensure consistency of performance in a range of contexts. This unit can be assessed either in the workplace or in a simulated environment. However, simulated activities must closely reflect the workplace to enable full demonstration of competency. • Assessment will usually include observation of real or simulated work processes and procedures and/or performance in a project context as well as questioning on underpinning knowledge and skills. The questioning of team members, supervisors, subordinates, peers and clients where appropriate may provide valuable input to the assessment process. The interdependence of units for assessment purposes may vary with the particular project or scenario.

Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • ICAS1193B Connect a workstation to the internet • ICAU1128B Operate a personal computer • ICAU1129B Operate a word processing application • ICAU1213B Conduct on-line transactions • ICAS2243B Detect and protect from spam and destructive software An individual demonstrating this competency would be able to: • Demonstrate knowledge by recall in a narrow range of areas • Demonstrate basic practical skills, such as the use of relevant tools • Perform a sequence of routine tasks given clear direction • Receive and pass on messages and information

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	• Maintain knowledge of industry products and services

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Internet browser may include but is not limited to:	• Netscape Navigator • Internet Explorer • Mozilla • Opera • Galleon • Phoenix • Konqueror • Lynx
Internet options may include but are not limited to:	• configuring of the following options: home page, location of temporary files, privacy level, security level, type of connection and history
Toolbar can contain:	• buttons • menus • a combination of both
Netiquette	• Is sometimes referred to as web etiquette and is an informal code of manners governing online conduct which may include but is not limited to the use of upper and lower case letters in messages, not spamming other users, not posting commercial messages to newsgroups, learning to lurk before posting, respect for other's time, privacy and bandwidth
Search engine may include:	• Snap • Questfinder • Ask Jeeves • Google

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RANGE STATEMENT	
	• Metacrawler • Alta Vista • Excite • Infoseek • Findlink • Northern Light • AOL Netfind • Hotbot • LookSmart • Yahoo • Netscape • Lycos • Open Text • WebCrawler • Go To Dot Com • Beaucoup • Meta Search • Search.com • Go2Network • Savvy Search • Profusion • Dogpile • Metagopher
Organisational guidelines may include but are not limited to:	• personal use of emails and internet access • content of emails • downloading information and accessing particular websites • opening mail with attachments • virus risk (MS windows OS and Mac OS only)
Files may include but is not limited to:	• html pages • pdf files • text files • pictures • music • email messages

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Unit Sector(s)

Unit sector	Use

Co-requisite units

Co-requisite units		

Competency field

Competency field	

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ICAU1204B Locate and use relevant on-line information

Modification History

Not Applicable

Unit Descriptor

Unit descriptor	This unit defines the competency required to use search engines to locate required information on the internet and assess the content of sites for accuracy, currency and/or authority. The following units are linked and form an appropriate cluster: • ICAU1213B Conduct on line transactions • ICAS2243B Detect and protect from spam and destructive software No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Application of the Unit

Application of the unit	

Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Prerequisite units		

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Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Conduct a basic search using a search engine	1.1. Open an internet application and locate and access a ***search engine*** on the internet 1.2. Enter appropriate key words into the ***search engine*** to locate the desired information 1.3. Refine a search depending on outcomes of the original search 1.4. Conduct a thorough search within a website using the provided internal search facility if available
2. Conduct an advanced search using search tools	2.1. Use advanced search features, provided in most ***search engines*** 2.2. Use ***Boolean search*** techniques when required to enhance the search 2.3. Use multiple or meta search tools with a range of key words 2.4. Use ***search engines*** particular to a field of

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ELEMENT	PERFORMANCE CRITERIA
	knowledge to refine the outcome 2.5. Access related virtual community sites and newsgroups and note their objectives and operational arrangements 2.6. Conduct a search with domain names to refine the search
3. Use information that has been located	3.1. Cross-reference the information found by using several websites to determine the accuracy of the information obtained 3.2. Check the date that the website was last updated or the properties of the website to determine the currency of the information 3.3. Determine the website authority by looking at copyright statements, privacy statements and organisational information
4. Save and print information	4.1. Save information found in different file forms 4.2. Print information found in different file forms

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• Understanding key words • Operating a PC • Opening web pages • Using PC peripheral hardware
Required knowledge
• Using an internet web browser • Using internet search functions • Using research techniques • Evaluating and assessing the authority of information • Different types of search engines • Copyright and privacy statements

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Evidence Guide

EVIDENCE GUIDE	
The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • Assessment must ensure the ability to use search tools to locate information and make an informed assessment of the accuracy, currency, authority and reliability of the site and information located. To demonstrate competency in this unit the person will require access to: • Personal computer with internet capability • Printer
Context of and specific resources for assessment	Locating and using online information is an increasingly important business and personal function. Many organisations encourage activities and transactions to be conducted online. An increasing number of government provided information services and transactions require online user capability for effectiveness. The sourcing and verification of online information is an increasingly important research task for both individuals and organisations as a growing proportion of suppliers and customers use online facilities to market or secure good and services. The breadth, depth and complexity of knowledge and skills in this competency would prepare a person to perform a defined range of activities many of which may be routine and predictable. Assessment must ensure • Applications may include a variety of employment

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EVIDENCE GUIDE	
	related skills including preparatory access and participation skills, broad-based induction skills and/or specific workplace skills. They may also include participation in a team or work group.
Method of assessment	The purpose of this unit is to define the standard of performance to be achieved in the workplace. In undertaking training and assessment activities related to this unit, consideration should be given to the implementation of appropriate diversity and accessibility practices in order to accommodate people who may have special needs. Additional guidance on these and related matters is provided in ICA05 Section 1. • Competency in this unit should be assessed using summative assessment to ensure consistency of performance in a range of contexts. This unit can be assessed either in the workplace or in a simulated environment. However, simulated activities must closely reflect the workplace to enable full demonstration of competency. • Assessment will usually include observation of real or simulated work processes and procedures and/or performance in a project context as well as questioning on underpinning knowledge and skills. The questioning of team members, supervisors, subordinates, peers and clients where appropriate may provide valuable input to the assessment process. The interdependence of units for assessment purposes may vary with the particular project or scenario.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • ICAU1128B Operate a personal computer • ICAU1133B Send and retrieve information using web browsers and email • ICAU1213B Conduct on-line transactions • ICAS2243B Detect and protect from spam and destructive software

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EVIDENCE GUIDE	
	An individual demonstrating this competency would be able to: • Demonstrate knowledge by recall in a narrow range of areas • Demonstrate basic practical skills, such as the use of relevant tools • Perform a sequence of routine tasks given clear direction • Receive and pass on messages and information • Maintain knowledge of industry products and services

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Search engine may include:	• Snap • Questfinder • Ask Jeeves • Google • metacrawler • Alta Vista • Excite • infoseek • Findlink • Northern Light • AOL Netfind • Hotbot • LookSmart • Yahoo • Netscape • Lycos • Open Text

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RANGE STATEMENT	
	• WebCrawler • Go To Dot Com • Beaucoup • Meta Search • Search.com • Go2Network • Savvy Search • Profusion • Dogpile • Metagopher
Boolean search may use terms such as:	• AND • OR • NOT

Unit Sector(s)

Unit sector	Use

Co-requisite units

Co-requisite units		

Competency field

Competency field	

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ICAU2006B Operate computing packages

Modification History

Not Applicable

Unit Descriptor

Unit descriptor	This unit defines the competency required to identify, select and correctly operate three desktop applications for a range of purposes. There may be benefit in concurrent learning with the following units: • ICAU2005B Operate computer hardware • ICAU2231B Use computer operating system The following units are linked and form an appropriate cluster: • ICAD2003B Receive and process oral and written communication • ICAI2015B Install software applications • ICAW2001B Work effectively in an IT environment No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Application of the Unit

Application of the unit	

Licensing/Regulatory Information

Refer to Unit Descriptor

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Pre-Requisites

Prerequisite units		

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	**PERFORMANCE CRITERIA**
1. Use appropriate software	1.1. Select ***software*** appropriate to perform activity 1.2. Use ***software*** to produce required outcome using a range of features related to the activities 1.3. Save documents in appropriate directories/folders
2. Access, retrieve and manipulate data	2.1. Select and access ***files*** 2.2. Amend and save ***files*** according to requirements 2.3. Produce documents and ***files*** that meet organisational needs 2.4. Save ***files*** in appropriate directories/folders 2.5. Exit ***software*** correctly without loss of ***data***
3. Access and use help	3.1. Identify the help resources available for basic

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ELEMENT	PERFORMANCE CRITERIA
functions within each application	difficulties with the ***software*** 3.2. Access user help documentation and other resources for basic difficulties with the ***software***
4. Use keyboard and equipment	4.1. Follow ***OH&S*** standards and regulations to avoid injury or illness 4.2. Use wrist rests and document holders where appropriate 4.3. Use monitor anti-glare and radiation reduction screens where appropriate 4.4. Ensure user ***equipment*** is maintained and free from defects that could cause injury

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE
This section describes the skills and knowledge required for this unit.
Required skills
• Basic analysis of desktop layout, monitor and chair positioning, keyboard techniques and use of the mouse • Basic problem solving in application management and help function usage • Reading and writing at a level where basic workplace documents are understood • Clear and precise communication with team members and supervisors • Interpretation of user manuals
Required knowledge
• OH&S principles and responsibilities • Basic understanding of system usage • Basic technical terminology in relation to reading help files and responding to system help prompts • Personal computer access and log-on procedures

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Evidence Guide

EVIDENCE GUIDE	
The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • Assessment must confirm the ability to produce several workplace documents utilising a minimum of three different computing packages. Learner will demonstrate the use of a wide range of features from each package. To demonstrate competency in this unit the person will require access to: • Personal computer • Basic software • Documents or information containing data suitable for use with computing packages
Context of and specific resources for assessment	This unit brings together a range of basic computer skills and knowledge consistent with general expectations around computer usage in the workplace. The breadth, depth and complexity of knowledge and skills in this competency would prepare a person to perform in a range of varied activities or knowledge applications where there is a clearly defined range of contexts in which the choice of actions required is usually clear. There would generally be limited complexity in the range of operations to be applied. Assessment must ensure: • Performance of a prescribed range of functions involving known routines and procedures and some accountability for the quality of outcomes would be characteristic. • Applications may include some complex or non-routine activities involving individual

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EVIDENCE GUIDE	
	responsibility or autonomy and/or collaboration with others as part of a group or team.
Method of assessment	The purpose of this unit is to define the standard of performance to be achieved in the workplace. In undertaking training and assessment activities related to this unit, consideration should be given to the implementation of appropriate diversity and accessibility practices in order to accommodate people who may have special needs. Additional guidance on these and related matters is provided in ICA05 Section 1. • Competency in this unit should be assessed using summative assessment to ensure consistency of performance in a range of contexts. This unit can be assessed either in the workplace or in a simulated environment. However, simulated activities must closely reflect the workplace to enable full demonstration of competency. • Assessment will usually include observation of real or simulated work processes and procedures and/or performance in a project context as well as questioning on underpinning knowledge and skills. The questioning of team members, supervisors, subordinates, peers and clients where appropriate may provide valuable input to the assessment process. The interdependence of units for assessment purposes may vary with the particular project or scenario.
Guidance information for assessment	Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • ICAU2005B Operate computer hardware • ICAU2231B Use computer operating system • ICAD2003B Receive and process oral and written communication • ICAI2015B Install software applications • ICAW2001B Work effectively in an IT environment An individual demonstrating this competency would be able to:

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EVIDENCE GUIDE	
	• Demonstrate basic operational knowledge in a moderate range of areas • Apply a defined range of skills • Apply known solutions to a limited range of predictable problems • Perform a range of tasks where choice between a limited range of options is required • Assess and record information from varied sources • Communicate with team members to clarify job requirements • Take limited responsibility for own outputs in work and learning • Maintain knowledge of industry products and services Demonstration of these competencies would involve: • Using appropriate software • Opening, amending and saving files and documents according to organisational requirements • Using help manuals and on-line help when appropriate • Applying OH&S procedures • Demonstrating basic operational knowledge in a moderate range of areas • Performing a range of tasks where choice between a limited range of options is required • Assessing and recording information from varied sources

Range Statement

RANGE STATEMENT
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

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RANGE STATEMENT	
Software may include but is not limited to:	• commercial software applications • organisation-specific software • It is expected that a word processing application, Database Application and Spreadsheet application will be chosen in preference to other types of applications
Files may include but is not limited to:	• html pages • pdf files • text files • pictures • music • email messages
Data may include:	• text • images • graphics • screenshots • icons added to the document
Equipment may include but is not limited to:	• workstations • personal computers • modems and other connectivity devices • printers • hard drives • DSL modems • monitors • switches • hubs • personal digital assistant (PDA) • other peripheral devices
OH&S may include:	• correct posture • lighting • type of desk • type of monitor • style of chair • typing position • repetitive strain injury prevention • ventilation • light position • length of time in front of computer

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Unit Sector(s)

Unit sector	Use

Co-requisite units

Co-requisite units		

Competency field

Competency field	

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PSPETHC301B Uphold the values and principles of public service

Modification History

Not applicable.

Unit Descriptor

Unit descriptor

This unit of competency describes the outcomes required to demonstrate ethical conduct required of those in public service. It includes applying ethical standards and dealing with ethical problems.

This unit replaces and is equivalent to *PSPETHC301A Uphold the values and principles of public service*.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of publication.

Application of the Unit

Application of the unit

This unit supports the attainment of skills and knowledge required for applying ethical conduct and accountability required in those working in government employment.

In practice, ethical conduct is demonstrated in the context of other generalist or specialist work activities such as building and maintaining networks, delivering client services, using financial resources, procuring goods or services, etc.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

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Employability Skills Information

Employability skills This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. **Apply ethical standards**	1.1 Interpretation of *ethical values and principles* is reviewed with senior staff to ensure accuracy 1.2 Personal *work practices* are undertaken in compliance with public sector ethics standards, organisational policy and *guidelines* 1.3 Verbal and written advice and reports are prepared containing information which is impartial, substantiated, accurate and complete 1.4 Public *resources* are *used* in accordance with public sector ethics standards, organisational policy and guidelines 1.5 *Conflicts of interest* are identified, declared, addressed and documented in accordance with policy and procedures 1.6 Personal behaviour and relationships with the public, suppliers and business contacts are conducted in accordance with ethics standards, policy and guidelines
2. **Deal with ethical problems**	2.1 Situations which pose ethical problems are resolved or *referred* in accordance with organisational guidelines 2.2 Decision-making *processes* used to resolve ethical problems are recorded in accordance with organisational policy and procedures

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ELEMENT	PERFORMANCE CRITERIA
	2.3 Organisational policies/codes on the prevention and reporting of *unethical conduct* are accessed and applied

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Required skills:

Look for evidence that confirms skills in:

- applying objective and impartial evaluation of conflicting requirements
- using ethical decision making
- preparing written advice and reports requiring accuracy of expression
- accessing legislation and codes of ethics electronically or in hard copy
- tailoring communication to suit different audiences
- responding to diversity, including gender and disability
- applying occupational health and safety procedures relating to ethical work practices

Required knowledge:

Look for evidence that confirms knowledge and understanding of:

- the nature of ethics and ethical values
- fundamental ethical principles such as justice, respect for persons, procedural fairness, confidentiality, responsible care
- values of public sector office
- natural justice/procedural fairness
- equal employment opportunity, equity and diversity principles
- where to access ethical decision making/problem solving models, organisational codes and procedures
- procedures for declaring conflicts of interest
- protocols for reporting fraud, corruption and maladministration
- occupational health and safety procedures relating to ethical work practices

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Evidence Guide

EVIDENCE GUIDE

The Evidence Guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for the Training Package.

Units to be assessed together

- *Pre-requisite* unitsthat must be achieved prior to this unit:*Nil*
- *Co-requisite* unitsthat must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:

PSPGOV303B Build and maintain internal networks

PSPGOV305B Access and use resources and financial systems

PSPGOV307B Organise workplace information

PSPGOV308B Work effectively with diversity

PSPGOV309A Address client needs

PSPGOV312A Use workplace communication strategies

PSPGOV314A Contribute to conflict management

PSPIM301A Process claims

PSPLAND302A Investigate tenure and land use history

PSPLEGN301B Comply with legislation in the public sector

PSPOHS301A Contribute to workplace safety

PSPPROC302A Undertake basic procurement

- This unit should be co-assessed with other units to supply the context for ethical behaviour

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- ethical conduct in a range of (3 or more) contexts (or occasions, over time) where contexts may be generalist or specialist work activities such as building and maintaining networks, delivering client services, using financial resources, procuring goods or services etc.

Resources required to

These resources include:

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EVIDENCE GUIDE

carry out assessment

- ethics-related legislation and guidelines
- codes of conduct and codes of ethics
- public sector standards, procedures and protocols
- ethical decision making/problem solving models
- manager/mentor/network who role models ethical conduct

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when working ethically in a public sector environment, including coping with ambiguity, difficulties, irregularities and breakdowns in routine
- ethical conduct in a range of (3 or more) contexts (or occasions, over time) where contexts may be generalist or specialist work activities such as building and maintaining networks, delivering client services, using financial resources, procuring goods or services etc.

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations.

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- case studies
- portfolios
- questioning
- scenarios
- simulation or role plays
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

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Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the Performance Criteria, is detailed below. Add any essential operating conditions that may be present with training and assessment depending on the work situation, needs if the candidate, accessibility of the item, and local industry and regional contexts.

Ethical values and principles *may include*	• respect for the law • integrity • objectivity • accountability • honesty • openness • responsibility • impartiality • diligence • trustworthiness • confidentiality • respect for persons • responsible care • probity • economy and efficiency • natural justice/procedural fairness, that is: • the right to be heard/put your case • the right to be informed of a complaint or case against you • the right to know the outcomes/recommendations of an investigation involving you • the right to know reasons for decisions affecting you • the right to privacy • the right to representation • the right to silence • the decision maker should not be a judge in his/her own cause
Work practices *may include*	• behaviours • conduct • relationships with work colleagues, external individuals and organisations • the manner in which work activities are carried out
Legislation and	• legislation for public sector management

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RANGE STATEMENT

guidelines *may include*	• freedom of information • privacy legislation • equal employment opportunity and anti-discrimination law • public sector standards • Ministerial directions • State/Territory or Commonwealth codes of ethics • organisational codes of conduct • sets of values • organisational mission and values statements • organisational policy, procedures/guidelines • government policy • professional codes of ethics and conduct • equity guidelines, workplace diversity guidelines
Public resources *may include*	• time • stationery • equipment • telephones • Internet • Email
Use of public resources *includes*	• effective use • efficient use - avoiding/minimising waste • not for private use
Conflicts of interest *may include*	• potential, perceived and actual conflicts • bribery • improper use of official information • improper use of resources, including plant and equipment • acceptance of gifts • entertainment • previous and outside employment, including voluntary work • favours for friends and/or relatives • memberships of organisations • political activity • pecuniary and non-pecuniary conflicts
Ethical problems which may need to be referred rather than resolved at this level *may include*	• conflict between public sector standards and personal values • conflict between public sector standards and other standards such as professional standards • conflict between public sector standards and directions of a

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RANGE STATEMENT

	senior officer or Minister • tension between two 'rights', for example, the right to privacy versus the right to freedom of information • conflict regarding issues of personal and organisational intellectual property
Referrals of ethical problems *may be made to*	• line management • chief executive officer • public service commissioner • public sector standards body • organisational ethics committee • internal grievance mechanisms, including identified officers • confidant programs (whistleblower protection programs) • organisational professional reporting procedures • unions and professional bodies • ombudsman • police
Processes for resolving ethical problems *may include*	• accessing relevant standards and other information • withdrawing from a situation • using models of ethical decision making/problem solving • reflection, discussion, seeking clarification from others.
Unethical conduct *may include*	• fraud, corruption, maladministration and waste • unauthorised access to and/or use of information, money/finances, vehicles, equipment, resources, time • improper actions during contractual processes, such as release of intellectual property, infringing copyright, release of tender information, inappropriate disclosure during tender process • improper public comment on matters relating to the government and/or the organisation • falsifying records • giving false testimonials • dishonesty • improper use of plant and equipment, credit cards, frequent flyer points, telephones, email and Internet • extravagant or wasteful practices • personal favours • preferential treatment • putting barriers in place, hindering, blocking action • compromising behaviour including sexual harassment • lack of confidentiality

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RANGE STATEMENT

- directing others to act unethically
- oppressive/coercive management decisions
- resorting to illegality to obtain evidence

Unit Sector(s)

Not applicable.

Competency field

Competency field Ethics and Accountability

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PSPGOV314A Contribute to conflict management

Modification History

Not applicable.

Unit Descriptor

Unit descriptor

This unit covers the requirement to contribute to conflict management in the workplace between self and others, such as staff or clients. It includes recognising the presence of conflict, dealing with emotions, overcoming barriers to communication, gathering the facts, agreeing on and implementing action. It does not include managing conflict between two other parties, formal negotiation, counselling or conducting mediation.

In practice, contributing to conflict management may overlap with other generalist or specialist public sector work activities such as acting ethically, complying with legislation, working effectively, working with diversity, using workplace communication strategies, etc.

This is one of 4 units of competency in the *Working in Government* and *Human Resource Management* Competency Fields that deal with conflict. Related units are:

PSPGOV411A Deal with conflict

PSPGOV508A Manage conflict

PSPHR603B Provide advisory and mediation services

This is a new unit of competency, added to the *Working in Government* Competency Field of the Training Package in 2004.

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Not applicable.

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.	Together, performance criteria specify the requirements for competent performance. Text in *italics* is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. **Recognise the presence of conflict**	1.1 *Conflict situations* and/or the potential for conflict are recognised and confirmed 1.2 The signs, stages and *causes of conflict* are identified 1.3 Conflict situations are *avoided* where appropriate, and assistance sought when necessary 1.4 Records of actual/potential conflict are completed in accordance with organisational policy and procedures
2. **Deal with emotions**	2.1 Own behaviour and feelings about the situation are reflected on 2.2 Own emotions are recognised and managed 2.3 The other party's emotions are acknowledged and dealt with in a manner that prevents escalation
3. **Overcome barriers to communication**	3.1 Barriers to effective communication are identified 3.2 Factors and issues relevant to the situation are identified, clarified and confirmed using appropriate *communication techniques* 3.3 Third party support is sought if necessary in accordance with *legislation, policy and procedures* 3.4 *Social and cultural differences* are taken into account in the

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ELEMENT	PERFORMANCE CRITERIA
	communication style and approach taken
4. Gather the facts	4.1 The other party is encouraged to relate the facts as they see them
	4.2 Information from the other party, as well as emotions or behaviour, is assessed
	4.3 Facts from own point of view are shared with the other party objectively
	4.4 Additional information is gathered and included where possible, to ensure all perspectives are considered
5. Agree on and implement action	5.1 *Strategies* to solve the problem/issue are determined in consultation with the other party
	5.2 Where necessary, approval on agreed strategies is obtained in accordance with organisational policy and procedures, and strategies are implemented
	5.3 Progress is monitored with other party to confirm the effectiveness of the agreed action
	5.4 Records and reports are completed in accordance with legislation, organisational policy and procedures
	5.5 Where agreement cannot be reached on strategies for resolution, the problem/issue is referred in accordance with organisational policy and procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

- using a range of communication techniques with a diverse workforce and client base including assertiveness, listening, non-verbal communication, language style, problem solving
- using problem solving to deal with unexpected issues or attitudes
- dealing with difficult situations and people
- responding to diversity, including gender and disability
- applying procedures relating to occupational health and safety and environment in the context of conflict resolution

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REQUIRED SKILLS AND KNOWLEDGE

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- legislation, regulations, organisational policies, procedures and guidelines relating to managing conflict in the public sector workplace, including equal employment opportunity, diversity, anti-discrimination, harassment, occupational health and safety, privacy, confidentiality, freedom of information
- types of conflict in the workplace and typical causes
- conflict theory including signs, stages, levels, factors involved, results
- group processes and roles people play
- organisational structures and workplace culture
- different social and cultural practices
- conflict resolution skills and strategies
- personal power and positional power
- grievance procedures in the public sector
- equal employment opportunity, equity and diversity principles
- public sector legislation such as occupational health and safety and environment in the context of conflict resolution

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* unitsthat must be achieved prior to this unit:*Nil*
- *Co-requisite* unitsthat must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:

PSPETHC301B Uphold the values and principles of public service

PSPGOV301B Work effectively in the organisation

PSPGOV302B Contribute to workgroup activities

PSPGOV308B Work effectively with diversity

PSPGOV312A Use workplace communication strategies

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EVIDENCE GUIDE

PSPLEGN301B Comply with legislation in the public sector

PSPOHS301A Contribute to workplace safety

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- contribution to conflict management in a range of (3 or more) contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

- legislation, policy, procedures and protocols relating to the public sector
- grievance procedures in the public sector
- strategies and guidelines for dealing with workplace conflict
- case studies and workplace scenarios to capture the range of situations likely to be encountered when contributing to conflict management

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when contributing to conflict management, including coping with difficulties, irregularities and breakdowns in routine
- contribution to conflict management in a range of (3 or more) contexts (or occasions, over time)

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination

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EVIDENCE GUIDE

	of 2 or more of: • case studies • portfolios • questioning • scenarios • simulation or role plays • authenticated evidence from the workplace and/or training courses
For consistency of assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in *italics* in the Performance Criteria is explained here.

Conflict situations may relate to	• conflicts with work colleagues • refusals to follow directions/guidance • customer complaints/dissatisfaction • disagreements with members of the public • bystander behaviour • drug or alcohol affected persons • persons suffering emotional distress
Causes of conflict may include	• personality clashes • poor communication • competing needs • cross-cultural issues • abuse of power • workplace bullying • customer dissatisfaction

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RANGE STATEMENT

- gender issues
- inter-generational issues

Avoidance and/or assistance may be necessary for

- unsafe situations
- escalating situations
- physical danger
- situations beyond one's level of expertise or comfort zone

Communication techniques may include

- verbal and non-verbal language
- questioning and listening
- cooperative language
- control of emotions, voice and body language
- constructive feedback
- reflection
- summarising
- re-phrasing
- paraphrasing
- presenting options
- using language and concepts suited to the occasion and the other party
- showing a willingness to compromise

Legislation, policies and procedures may include

- State/Territory or Commonwealth legislation, regulations, organisational policies, procedures and guidelines relating to the conflict management in the public sector, including equal employment opportunity, diversity, anti-discrimination, harassment, occupational health and safety, privacy, confidentiality, freedom of information
- public sector standards
- codes of practice
- codes of ethics
- security standards

Social and cultural differences may include

- beliefs and values
- social conventions
- family relationships
- codes of conduct
- cultural observances
- verbal and non-verbal language

Strategies may include

- a partnership approach
- working cooperatively on solving the problem

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RANGE STATEMENT

- third party assistance
- mediation

Unit Sector(s)

Not applicable.

Competency field

Competency field Working in Government

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PSPGOV406B Gather and analyse information

Modification History

Not applicable.

Unit Descriptor

Unit descriptor

This unit covers collection and analysis of information to achieve work unit objectives and meet client needs. It includes identifying and collecting information, analysing and interpreting information, developing and applying workable solutions, presenting information and maintaining information.

In practice, gathering and analysing information may overlap with other generalist or specialist public sector work activities such as acting ethically, complying with legislation, applying government processes, using resources, gathering evidence, carrying out projects, using financial processes, identifying and treating risks, monitoring for fraud, undertaking, court listings, conducting claim assessments, etc.

This is one of 5 units of competency in the *Working in Government* and *Management* Competency Fields that deal with information/knowledge management. Related units are:

PSPGOV206B Handle workplace information PSPGOV307B Organise workplace informationPSPGOV504B Undertake research and analysisPSPMNGT614A Facilitate knowledge management

This unit replaces and is equivalent to *PSPGOV406A Gather and analyse information*.

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Not applicable.

Employability Skills Information

Employability skills This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in *italics* is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify and collect information	1.1 Nature, extent and purpose of required *information* is identified 1.2 Internal and external *sources* are identified and accessed to produce required information in accordance with *legislation, policy and procedures* 1.3 Information is collected, organised, recorded and reported in accordance with organisational procedures and defined guidelines 1.4 Information collected is organised in a way which enables easy access and retrieval by other staff
2. Analyse and interpret information	2.1 Information and its sources are critically evaluated for relevance and validity to business/client requirements 2.2 Basic *analysis* of information is undertaken as required to identify key issues 2.3 More detailed analysis of information is carried out as required using relevant techniques including mathematical calculations and methods for numerical/graphical information
3. Develop and apply workable solutions	3.1 Workable solutions to business/client requirements are developed on consideration of analysed information 3.2 Proposed solutions are communicated or implemented as required

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ELEMENT	PERFORMANCE CRITERIA
4. Present information	4.1 Information is reported in the required format, style, structure and timeframe 4.2 Information is *presented* in required medium in accordance with organisational requirements using relevant technology
5. Maintain information	5.1 A range of standard and complex *information systems* and operations is used in accordance with organisational policy and procedures 5.2 Information and records are maintained in accordance with organisational procedures to ensure data and system integrity 5.3 Routine data and records are reconciled as required 5.4 Inadequacies in system/s relating to information retrieval are identified and corrected or reported to relevant staff as required

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

- applying public sector legislation such as occupational health and safety and environment in the context of information management
- accessing and using information ethically and legally
- using manual and computerised techniques for information management
- applying computer technology to data storage, security, retrieval and presentation
- using basic statistical and numerical manipulation
- using critical analysis techniques
- communicating with colleagues and supervisors
- presenting information in a range of ways such as report format, numerically, in tables, with graphs, spatially
- responding to diversity, including gender and disability
- using problem solving and referring problems as required
- applying equal employment opportunity, equity and diversity principles

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

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REQUIRED SKILLS AND KNOWLEDGE

- legislation, policies, procedures and guidelines relating to information handling in the public sector, such as confidentiality, privacy, security, freedom of information
- data collection and management procedures
- organisational information handling and storage procedures
- cultural aspects of information and meaning
- sources of public sector work-related information
- economic, legal, security and social issues surrounding the use of information
- public sector standards
- electronic and manual filing systems
- databases and data storage systems
- equal employment opportunity, equity and diversity principles
- public sector legislation such as occupational health and safety and environment in the context of information management

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* unitsthat must be achieved prior to this unit:*Nil*
- *Co-requisite* unitsthat must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:

PSPCRT407A Undertake court listings

PSPETHC401A Uphold and support the values and principles of public service

PSPFIN401A Use public sector financial processes

PSPFRAU401B Monitor data for indicators of fraud

PSPGOV402B Deliver and monitor service to clients

PSPGOV403B Use resources to achieve work unit goals

PSPGOV404B Develop and implement work unit plans

PSPGOV405B Provide input to change processes

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EVIDENCE GUIDE

PSPGOV407B Provide a quotation

PSPGOV417A Identify and treat risks

PSPGOV422A Apply government processes

PSPIM401A Conduct initial claim assessments

PSPLEGN401A Encourage compliance with legislation in the public sector

PSPPM404A Carry out simple project activities

PSPREG411A Gather information through interviews

PSPREG412A Gather and manage evidence

PSPSEC405A Handle security classified information

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- information gathered and analysed in a range of (3 or more) contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

- legislation, policy, procedures and protocols relating to information research, presentation and management
- access to electronic information/records management systems
- Case studies and workplace scenarios to capture the range of situations likely to be encountered when gathering and analysing information

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when gathering and analysing information, including coping with difficulties, irregularities and breakdowns in routine
- information gathered and analysed in a range of (3 or more) contexts (or occasions, over time).

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities

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- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations.

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- case studies
- portfolios
- projects
- questioning
- scenarios
- simulation or role plays
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in *italics* in the Performance Criteria is explained here.

Information may include

- legislation, guidelines and awards
- organisation, legal and policy materials
- client information
- market trends
- media reports
- registries and file records
- library materials

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RANGE STATEMENT

- financial records
- basic statistical information
- human resources/personnel records
- asset records
- meta-data

Sources of information may include

- those internal to the organisation such as:
- intranet
- databases/files
- library collections
- internal publications
- annual reports
- newsletters
- other staff.
- those external to the organisation such as:
- Internet
- local, state, national and international libraries and archives
- other organisations' publications
- staff in external organisations

Legislation, policy and procedures may include

- Commonwealth and State/Territory legislation, standards and guidelines especially relating to privacy, confidentiality, freedom of information, security, fraud control, copyright, intellectual property
- government policy
- public sector code of ethics
- national standards
- Australian standards such as records management, knowledge management, risk management
- the organisation's policies/practices/code of conduct

Analysis of information may include

- qualitative analysis
- quantitative analysis
- critical analysis
- problem solving
- matching
- statistical analysis
- mathematical calculations
- forecasting

Presentation of

- routine reports and submissions

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information may include	• briefing notes, Ministerials • proposals, project plans • articles and promotional material • tabular or graphical presentation • overhead transparencies • slideshow data presentation • face-to-face • telephone
Information systems may include	• file/records management systems • personnel/human resources systems • specific purpose databases • library systems • data warehouse systems • web sites • financial information systems • workplace communication systems

Unit Sector(s)

Not applicable.

Competency field

Competency field Working in Government

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PSPGOV407B Provide a quotation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor

This unit covers the conduct of a cost-benefit analysis and the preparation of written or oral quotations to provide goods or services to others. It includes clarifying requirements, establishing costs and availability of resources, preparing estimates, preparing and submitting quotations and taking follow-up action.

In practice, providing a quotation may overlap with other generalist or specialist public sector work activities such as acting ethically, complying with legislation, applying government processes, gathering and analysing information, using resources, etc.

This is one of 2 unit of competency in the *Working in Government* Competency Field dealing with quoting/tendering for work. The related unit is:

PSPGOV603B Develop a tender submission response

This unit replaces and is equivalent to *PSPGOV407A Prepare a quotation*.

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

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Employability Skills Information

Employability skills This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in *italics* is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Clarify requirements	1.1 Requirements are confirmed with the funder/purchaser in accordance with organisational policy and procedures 1.2 Market research is conducted in accordance with *legislation, policy and procedures* to confirm the viability of providing a quotation
2. Establish costs and availability of resources	2.1 Costs for labour, equipment or materials are obtained in accordance with organisational policy and procedures and included in the quotation in full 2.2 Availability of equipment, materials or personnel is confirmed for the timeframe required 2.3 Infrastructure costs to the organisation of providing the goods or services are included 2.4 Cost or benefit from any asset disposal at the conclusion of the contract is included
3. Prepare estimate	3.1 Estimate is prepared to take account of all requirements and allow for contingencies 3.2 Estimate is structured to provide for cost recovery or to return a profit according to legislation, policy and procedures 3.3 Costs are estimated to enable provision of goods or *services* to the standards required by the *client* 3.4 Estimate is checked for accuracy and detailed in accordance with organisational procedures and client requirements
4. Prepare and submit	4.1 Quotation is prepared in accordance with organisational policy

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ELEMENT	PERFORMANCE CRITERIA
quotation	and procedures 4.2 Required details are included to meet client requirements 4.3 Quotation is submitted within required timeframe 4.4 Organisational recordkeeping requirements for providing quotations are met
5. Take follow-up action	5.1 Changes and variations to the quotation are negotiated to meet the needs of the client and the organisation, in accordance with policy, procedure and delegated authority 5.2 Proposal, outcome and preparation process are evaluated using feedback from a range of *stakeholders* and the results are used to improve subsequent quotations

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

- using numeracy for selecting and applying mathematical concepts, estimating, checking reasonableness of results
- using a range of mathematical language to communicate mathematical information
- managing financial and other resources
- using literacy for oral clarification of issues and negotiating variations and changes with clients
- using required language and style for written quotations
- using technical and other vocabulary
- applying research and analysis methods
- using problem solving including conceptual/reasoning skills
- networking with clients, suppliers and stakeholders
- responding to diversity, including gender and disability
- applying legislation and guidelines including occupational health, safety and environment when providing quotations

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- legislation, guidelines, policies and practices relating to providing quotations for

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REQUIRED SKILLS AND KNOWLEDGE

services

- organisational tendering guidelines, policies and practices
- financial accountability requirements
- legal requirements of selling government services
- implications of contracting agreements where government is the provider
- whole-of-life considerations
- disposals considerations including legal aspects of disposals
- approval processes
- tendering management processes
- equal employment opportunity, equity and diversity principles
- public sector legislation including occupational health, safety and environment, in the context of providing quotations

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* unitsthat must be achieved prior to this unit:*Nil*
- *Co-requisite* unitsthat must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:

PSPETHC401A Uphold and support the values and principles of public service

PSPGOV403B Use resources to achieve work unit goals

PSPGOV404B Develop and implement work unit plans

PSPGOV406B Gather and analyse information

PSPGOV412A Use advanced workplace communication strategies

PSPGOV413A Compose complex workplace documents

PSPGOV417A Identify and treat risks

PSPGOV421A Exercise delegations

PSPGOV422A Apply government processes

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EVIDENCE GUIDE

PSPLEGN401A Encourage compliance with legislation in the public sector

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- quotations prepared and submitted in a range of (3 or more) contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

- legislation, policy, procedures and protocols relating to proving quotations
- case studies and workplace scenarios to capture the range of situations likely to be encountered when proving quotations

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when proving quotations, including coping with difficulties, irregularities and breakdowns in routine
- quotations prepared and submitted in a range of (3 or more) contexts (or occasions, over time).

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations.

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- case studies
- portfolios
- projects

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- questioning
- scenarios
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in *italics* in the Performance Criteria is explained here.

Legislation, policies and procedures may include

- State/Territory and Commonwealth legislation and regulations such as:
- public sector management acts
- privacy legislation
- freedom of information
- equal employment opportunity, anti-discrimination and harassment legislation
- employment legislation
- occupational health and safety legislation
- ethics and accountability standards
- public sector standards
- organisational policy, procedures and protocols
- international legislation/codes of behaviour
- enterprise bargaining agreements
- award conditions/requirements
- strategic and business plans
- delegation guidelines

Services quoted may include

- electronic
- computerised

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	• bureau services • procedural systems • training • mechanical
Clients may include	• private sector organisations • Commonwealth, State/Territory, Local Government organisations • intra-organisation units
Stakeholders may include	• clients • managers • peers

Unit Sector(s)

Not applicable.

Competency field

Competency field	Working in Government

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PSPGOV507A Undertake negotiations

Modification History

Not applicable.

Unit Descriptor

Unit descriptor

This unit covers negotiations as an individual or as a member of a negotiating team. It includes planning for the negotiation, conducting the negotiation and finalising the outcome.

In practice, negotiations may overlap with other generalist or specialist public sector work activities such as acting ethically, complying with legislation, providing leadership, undertaking research and analysis, initiating projects, performing quasi-judicial functions, etc.

This is a new unit of competency, added to the *Working in Government* Competency Field of the Training Package in 2004

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

Employability skills

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in *italics* is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. **Plan for negotiation**	1.1 The *purpose* of the negotiation and the issue/s under consideration are clarified with affected personnel and through analysis of all related documentation/information 1.2 Primary needs and desired outcomes of all parties are identified 1.3 The organisation's position is determined in consultation with senior personnel, and a *negotiating approach* is devised based on an analysis of the strengths and weaknesses of the position 1.4 *Information* relating to the negotiation, including any precedents, is collected, analysed and organised to support the negotiating approach 1.5 Timeframe and logistics are agreed and a *negotiation plan* is developed in accordance with legislation, policy and procedures, and communicated to other staff, if any, involved in the negotiation team
2. **Conduct negotiation**	2.1 The issue/s under consideration and the negotiation process to be used are agreed by all parties and documented in accordance with legislation, policy and procedures 2.2 *Negotiating techniques* are used to persuade the other party of the strength of the argument in favour of the organisation's position 2.3 The negotiation plan is modified if necessary to respond to *contingencies* 2.4 *Techniques* for dealing with conflict or deadlocks are selected and used in accordance with the negotiation plan and the progress of the negotiation 2.5 Options for resolving the issue are discussed and the acceptability of these to the parties is determined
3. **Finalise negotiation outcomes**	3.1 An agreed conclusion is reached, documented and signed-off by the parties 3.2 Negotiation outcomes are reported in accordance with

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ELEMENT	PERFORMANCE CRITERIA
	organisational policy and procedures and *stakeholders* are debriefed if required
	3.3 Any further action required as a result of agreement is determined and undertaken in accordance with organisational requirements
	3.4 The negotiation process and outcomes are reviewed, and lessons learnt are documented for future use in accordance with organisational recordkeeping practices

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

- applying legislation, regulations and policies relating to negotiating in the public sector
- communicating with diverse stakeholders such as the other party, team members, senior management, including listening, questioning, establishing rapport, responding, etc
- applying decision making and problem solving
- adjusting quickly to new information or unexpected questions and attitudes
- report writing
- responding to diversity, including gender and disability
- applying procedures relating to occupational health and safety and environment in the context of negotiations

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- legislation, regulations, policies, procedures and guidelines relating to negotiations in the public sector, such as freedom of information, privacy, equal employment opportunity
- sources of organisational information
- delegations and lines of authority
- decision making
- negotiation techniques
- conflict resolution
- recordkeeping requirements for negotiations
- equal employment opportunity, equity and diversity principles

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Evidence Guide

EVIDENCE GUIDE

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* unitsthat must be achieved prior to this unit:*Nil*
- *Co-requisite* unitsthat must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:

PSPCRT506A Perform quasi-judicial functions

PSPETHC501B Promote the values and ethos of public service

PSPGOV504B Undertake research and analysis

PSPGOV505A Promote diversity

PSPGOV508A Manage conflict

PSPGOV511A Provide leadership

PSPGOV512A Use complex workplace communication strategies

PSPLEGN501B Promote compliance with legislation in the public sector

PSPOHS501A Monitor and maintain workplace safety

PSPPM501B Design complex projects

PSPPROC502A Establish contract management arrangements

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- negotiations undertaken in a range of (3 or more) contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

- legislation, policy, procedures and protocols relating to negotiation, including freedom of information, privacy, equal employment opportunity, anti-discrimination, occupational health and safety

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- case studies and workplace scenarios to capture the range of negotiation situations likely to be encountered as an individual or as a team member

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when undertaking negotiations, including coping with difficulties, irregularities and breakdowns in routine
- negotiations undertaken in a range of (3 or more) contexts (or occasions, over time).

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations.

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- demonstration
- observation
- portfolios
- questioning
- scenarios
- simulation or role plays
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

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Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in *italics* in the Performance Criteria is explained here.

Purpose of negotiation may include	• required outcomes • other possible outcomes • organisational priorities • consequences of negotiation failing
Negotiating approach may be	• consultative • collaborative • competitive • confrontational • soft • passive
Information relating to the negotiation may include	• background to the dispute/issues under consideration • background information on the parties • organisational information • legislative requirements • organisational policy and procedures • material to support bargaining position • precedents
Negotiation plan may include	• roles and responsibilities of negotiation team members, if any • identification of team leader • timing • logistics • key facts • tactics • personal strengths and weaknesses • techniques to be used for negotiating, breaking deadlocks, dealing with conflict • fallback position • areas where compromise is possible • process management strategies • alternative dispute resolution processes

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RANGE STATEMENT

Negotiation techniques may include	• speaking skills • presentation techniques • effective listening • questioning techniques • verbal and non-verbal communication • using personal attributes • culturally and linguistically appropriate strategies • constructive feedback • issues identification • exploring options • identifying areas of agreement • recording agreements
Contingencies may include	• changed circumstances • changed tactics • changed agenda • new information • decision to withdraw
Techniques for breaking deadlocks may include	• clarifying • restating position • summarising progress • deferring decision • preparing a compromise • using a mediator/third party
Stakeholders may include	• management • union • colleagues/other staff • clients • public

Unit Sector(s)

Not applicable.

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Competency field

Competency field Working in Government

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PSPGOV602B Establish and maintain strategic networks

Modification History

Not applicable.

Unit Descriptor

Unit descriptor

This unit covers establishing, expanding and utilising strategic networks. It includes identifying features of required strategic networks, identifying or establishing network links with key stakeholders and building strategic relationships.

In practice, establishing and maintaining strategic networks may overlap with other generalist or specialist public sector work activities such as acting ethically, complying with legislation, applying government systems, managing change, managing diversity, etc.

This unit is one of 3 units of competency in the Working in Government Competency Field that deal with networks. Related units are:

PSPGOV303B Build and maintain internal networks

PSPGOV418A Develop internal and external networks

This unit replaces and is equivalent to PSPGOV602A Establish and maintain external networks

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

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Employability Skills Information

Employability skills This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in *italics* is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify features of required strategic networks	1.1 The strategic value and likely outcomes of participating in *networks* are identified at an individual and organisational level 1.2 The benefits of existing networks are researched and assessed 1.3 *Key stakeholders* and their needs, expectations and roles are identified
2. Identify or establish network links with key stakeholders	2.1 Existing network links between key stakeholders are identified, and strategies to maintain or expand them are identified and initiated 2.2 New network links between self and key internal and external stakeholders are established and used effectively 2.3 Strong working relationships are developed and maintained among network members
3. Build strategic relationships	3.1 Effective communication channels are established to exchange strategic information for the mutual benefit of network members 3.2 Interaction and consultation with key stakeholders are used to anticipate developments that may impact on the organisation and require a strategic approach to dealing with them 3.3 Misunderstandings and conflict situations are identified and constructively addressed in accordance with principles of conflict resolution 3.4 Opportunities are sought and acted upon to improve communication processes and achieve mutually beneficial outcomes

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

- applying legislation, regulations and policies relating to public sector environment
- using a range of communication methods with diverse strategic networks including consultation, liaison, negotiation, building influence and reputation, transparency
- using formal and informal industry communication channels
- responding to diversity, including gender and disability
- resolving conflict in a strategic networking context
- applying procedures relating to occupational health and safety and environment in the context of strategic networking

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- legislation, regulations, policies, procedures and guidelines relating to work in a public sector environment
- local/national/international public sector structures/protocols
- industry/professional communication channels and networks
- principles of interpersonal, group and inter-agency communication
- principles of conflict resolution in a strategic context
- equal employment opportunity, equity and diversity principles
- public sector legislation such as occupational health and safety and environment in the context of strategic networking

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

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Units to be assessed together

- *Pre-requisite* unitsthat must be achieved prior to this unit:*Nil*
- *Co-requisite* unitsthat must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:

PSPETHC601B Maintain and enhance confidence in public service

PSPGOV601B Apply government systems

PSPGOV605A Persuade and influence opinion

PSPLEGN601B Manage compliance with legislation in the public sector

PSPMNGT604B Manage change

PSPMNGT605B Manage diversity

PSPMNGT609B Formulate business strategies

PSPMNGT613A Develop partnering arrangements

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- strategic networks established/maintained in a range of (3 or more) contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

- legislation, policy, procedures and protocols relating to the public sector environment
- organisational charts
- case studies and workplace scenarios to capture the range of situations likely to be encountered when establishing and maintaining strategic networks

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment, or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when establishing and maintaining strategic networks, including coping with difficulties, irregularities and breakdowns in routine
- strategic networks established/maintained in a range of (3 or

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EVIDENCE GUIDE

more) contexts (or occasions, over time).

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations.

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- case studies
- portfolios
- projects
- questioning
- scenarios
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in *italics* in the Performance Criteria is explained here.

Networks may include

- formal or informal networks
- circulation lists
- e-networks

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- bulletin boards
- virtual communities
- mailing lists

Key stakeholders may include

- officers from other government organisations
- Ministerial advisers
- community members
- council members
- industry representatives
- professional associations
- international public sector staff
- international associations

Unit Sector(s)

Not applicable.

Competency field

Competency field Working in Government

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PSPHR616A Manage performance management system

Modification History

Not applicable.

Unit Descriptor

Unit descriptor

This unit covers the management of an organisation's performance management system to review and enhance employee performance. It includes developing a new or existing performance management framework, developing performance management processes, and managing the implementation of these processes.

In practice, managing a performance management system overlaps with other generalist and specialist workplace activities such as managing diversity, managing policy implementation, facilitating workforce effectiveness, managing human resource development etc.

This unit replaces *PSPHR606A Manage performance management processes*. The units are not equivalent. The revised unit has additional requirements and no longer covers evaluation of performance management processes. Evaluation is addressed in *PSPMNGT611A Manage evaluations*, added to the *Management* Competency field of the Training Package in 2004.

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

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Employability Skills Information

Employability skills This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in ***bold italics*** is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Develop performance management framework	1.1 Goals, objectives and required outcomes for the organisation's performance management framework are determined/confirmed in consultation with key *stakeholders* to improve the work effectiveness of the organisation
	1.2 The performance management framework is established/developed through consideration of existing good practice models and is integrated with other key human resource functions and areas
	1.3 The framework is linked to the organisation's operating context and strategic direction and developed through consultation with key stakeholders
	1.4 Key performance management *elements* are included in the framework
	1.5 The framework is developed based on the principles of natural justice, equity and fairness
2. Develop performance management processes	2.1 *Performance management processes* are developed which utilise performance standards established and validated by key stakeholders
	2.2 The processes are structured to provide for ongoing two-way communication between the performance manager, the employee, key stakeholders and clients
	2.3 Inclusive processes are developed to respond to the needs of the range of business units, position types and diverse employee working styles represented within the organisation
	2.4 The processes are structured to be flexible enough to allow for changes in the organisation's operating context and strategic direction

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ELEMENT	PERFORMANCE CRITERIA
	2.5 Options for dealing with inappropriate, over- or under-performance are detailed in the processes
	2.6 *Information* and advice is provided to facilitate effective implementation and assessment of processes
3. Manage implementation of performance management processes	3.1 An implementation plan is agreed in consultation with key stakeholders
	3.2 Systems are managed to monitor the effectiveness of performance management processes in accordance with contractual obligations, *legislation*, organisational *policy* and needs, and in consultation with managers
	3.3 *External and/or internal trends* or events which have an effect on the organisation's performance management processes are monitored and responses are formulated
	3.4 Adjustments to processes are implemented as a result of monitoring and/or changed internal/external trends and/or events
	3.5 Processes are monitored to gauge their effectiveness in providing support to staff involved in implementation

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

engaging in effective consultation with stakeholders

training, coaching, mentoring and facilitation

undertaking conflict resolution, negotiation and counselling

using a variety of words and language structures to explain complex ideas to different audiences

interpreting and explaining complex, formal documents and assisting others to apply them in the workplace

preparing written advice and reports requiring reasoning and precision of expression

responding to diversity, including gender and disability

applying occupational health and safety procedures in the context of managing a performance management system

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REQUIRED SKILLS AND KNOWLEDGE

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

the performance management concept within an organisational context

key components of performance management processes

grievance procedures

freedom of information, privacy, confidentiality

development strategies to support performance management processes

organisational goals, policies and procedures

the concept of diversity and its integration within and across all human resource functions and areas

equal employment opportunity, equity and diversity principles

the relationships between human resource functions

human resource policies and practices

national and/or international models of good practice in performance management

jurisdictional legislation applying to human resources, including occupational health and safety and environment

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* unitsthat must be achieved prior to this unit:*Nil*
- *Co-requisite* unitsthat must be assessed with this unit:*Nil*

Co-assessed units that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:

PSPETHC601B Maintain and enhance confidence in public service

PSPGOV601B Apply government systems

PSPGOV604A Foster leadership and innovation

PSPGOV605A Persuade and influence opinion

PSPHR603B Provide advisory and mediation services

PSPHR615A Manage human resource development strategies

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EVIDENCE GUIDE

PSPHR619A Manage remuneration strategies and plans

PSPLEGN601B Manage compliance with legislation in the public sector

PSPMNGT611A Manage evaluations

PSPMNGT615A Influence workforce effectiveness

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

the knowledge requirements of this unit

the skill requirements of this unit

application of the Employability Skills as they relate to this unit (see Employability Summaries in Qualifications Framework)

- performance management system managed in a range of (3 or more) contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

legislation, policies and procedures relating to performance management system development and management in the public sector

workplace scenarios and case studies to capture the range of situations likely to be encountered when managing a performance management system

performance management guidelines and other relevant workplace materials

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when managing performance management processes, including coping with difficulties, irregularities and breakdowns in routine
- performance management system managed in a range of (3 or more) contexts (or occasions, over time)

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

people with disabilities

people from culturally and linguistically diverse backgrounds

Aboriginal and Torres Strait Islander people

women

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	young people
	older people
	people in rural and remote locations
	Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:
	case studies
	portfolios
	questioning
	scenarios
	authenticated evidence from the workplace and/or training courses
For consistency of assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in *italics* in the Performance Criteria is explained here.

Stakeholders may include	all those individuals and groups both inside and outside the organisation that have some direct interest in the organisation's behaviour, actions, products and services such as:
	users of the human resource service
	employees at all levels of the organisation
	other public sector organisations
	union and association representatives
	boards of management
	government
	Ministers

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RANGE STATEMENT

Key performance management elements may include	framework culture tools processes work level standards common language for standards and appraisals reward and recognition strategies professional development strategies career management strategies under-performance policy grievance processes
Performance management refers to	planning and review of the on-the-job performance of individuals and groups of employees
Performance management processes may include	planning measurement reviews and appraisals monitoring evaluation feedback coaching performance agreements learning and development plans
Information about performance management processes may be distributed through	written documentation manuals policy and procedure statements, guides information brochures and pamphlets oral advice and guidance one-on-one meetings small group meetings telephone contact and/or electronic mail training programs

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RANGE STATEMENT

Legislation and policy may include	Commonwealth and State/Territory legislation including equal employment opportunity, anti-discrimination and employment law
	national and international codes of practice and standards
	the organisation's policies and practices
	government policy
	codes of conduct
	codes of ethics
	public sector standards
	security policy and procedures
Internal and external factors impacting upon performance management processes may include	emerging human resource development needs
	changed financial or political circumstances
	downsizing or organisation restructuring
	opportunities for outsourcing changes in legislation or core business activities
	changes in activities or aspirations of customers
	organisational changes
	labour market

Unit Sector(s)

Not applicable.

Competency field

Competency field	Human Resource Management

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PSPLEGN301B Comply with legislation in the public sector

Modification History

Not applicable.

Unit Descriptor

Unit descriptor

This unit covers compliance with legislation and related public sector policy guidelines and procedures. It includes identifying and complying with legislative requirements and reporting incidents of non-compliance.

In practice, complying with legislation is demonstrated in the context of other generalist or specialist work activities such as delivering client services, using financial resources, procuring goods or services, etc.

This unit replaces and is equivalent to *PSPLEGN301A Comply with legislation in the public sector*

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

Employability skills

This unit contains employability skills.

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Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in *italics* is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Identify legislative requirements	1.1 Information is accessed that covers the range of *legislation and guidelines* relating to the workplace and is current and comprehensive 1.2 Key requirements of relevant pieces of legislation are identified and confirmed with senior staff 1.3 Requirements of legislation are clarified to confirm understanding and ensure consistency of interpretation and application 1.4 Clarification is obtained of the way various pieces of legislation are integrated to provide a legislative framework for public sector work 1.5 Advice is obtained when apparently *conflicting legislative directives* are found
2. Comply with legislative requirements	2.1 Work practices are carried out in accordance with the requirements of legislation relating to the work environment 2.2 Own conduct is reviewed and feedback from others is used to confirm continuing compliance with legislative requirements
3. Report incidents of non-compliance	3.1 Possible breaches of legislation are raised promptly with an authorised person/body in accordance with organisational procedures 3.2 *Inadequacies in workplace procedures* which may contribute to non-compliance are raised in accordance with organisational procedures

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for

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REQUIRED SKILLS AND KNOWLEDGE

this unit.

Skill requirements

Look for evidence that confirms skills in:

- undertaking research and evaluation
- undertaking self-assessment
- reading complex and formal documents such as legislation and related materials to apply them to work practices and to identify inappropriate conduct
- communicating with others involving exchanges of complex oral and written information
- using technology to access legislative requirements
- responding to diversity, including gender and disability
- applying environmental and occupational health and safety procedures

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

- the range of legislation relating to the public sector (including occupational health and safety and environment) and the key requirements of each
- public sector codes of ethics/conduct
- equal employment opportunity, equity and diversity principles
- organisational processes/procedures for responding to legislative issues

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* unitsthat must be achieved prior to this unit:*Nil*
- *Co-requisite* unitsthat must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to:

PSPETHC301B Uphold the values and principles of public service

PSPGOV305B Access and use resources and financial systems

PSPGOV307B Organise workplace information

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PSPIM301A Process claims

PSPPROC302A Undertake basic procurement

PSPSEC301A Secure government assets

Overview of evidence requirements

In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms:

- the knowledge requirements of this unit
- the skill requirements of this unit
- application of Employability Skills as they relate to this unit
- compliance with legislation in a range of (3 or more) contexts (or occasions, over time)

Resources required to carry out assessment

These resources include:

- public sector legislation, regulations and guidelines
- procedures and protocols
- scenarios and case studies to capture the range of situations likely to be encountered when complying with public sector legislation

Where and how to assess evidence

Valid assessment of this unit requires:

- a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when complying with legislation in the public sector, including coping with difficulties, irregularities and apparently conflicting legislative requirements
- compliance with legislation in a range of (3 or more) contexts (or occasions, over time).

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations.

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

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- case studies
- portfolios
- questioning
- scenarios
- simulation or role plays
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in *italics* in the Performance Criteria is explained here.

Legislation and guidelines may relate to

- public sector standards:
- codes of conduct/ethics
- guarantee of service
- legislated standards
- State/Territory/Commonwealth/organisational standards
- technical/industrial standards
- professional standards
- industry competency standards
- anti-corruption legislation
- whistleblowers' protection.
- public sector employment:
- employee relations
- chief executive officer's instructions
- Commissioner's instructions
- public sector notices.
- workplace environment:
- equal employment opportunity

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RANGE STATEMENT

- affirmative action
- workplace diversity
- anti-discrimination
- workplace harassment
- occupational health and safety
- duty of care.
- security, storage, handling and classification of documents
- financial management and accountability:
- Treasurer's instructions
- contractual obligations.
- transparency:
- freedom of information
- professional reporting
- accountability
- fair trading.
- business and community:
- privacy
- trade practices
- competition
- road transport legislation.
- information and records management standards and legislation
- the organisation's enabling legislation, regulations
- aspects of common law, criminal law, contract law, employment law and administrative law, including judges' rules
- international legislation/codes of behaviour

Conflicting legislative directives may include

- apparent contradiction between statutes
- apparent conflict between statutes and policy requirements

Inadequacies in workplace procedures may include

- insufficient financial/other controls
- insecure Internet/fax access
- non-auditable records processes
- ambiguous guidelines
- no guidelines
- unnecessary complexity
- use of non-current legislation

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Unit Sector(s)

Not applicable.

Competency field

Competency field Legislation&Compliance

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PSPMNGT614A Facilitate knowledge management

Modification History

Not applicable.

Unit Descriptor

Unit descriptor

This unit covers management of knowledge and information in the business unit to improve productivity and organisational efficiency, promote innovation and meet business unit goals. It includes establishing the organisational context for knowledge management, developing capability, facilitating knowledge management, and integrating aspects of knowledge management with information/records management.

In practice, facilitation of knowledge management may overlap with other generalist or specialist public sector work activities such as acting ethically, complying with legislation, applying government systems, managing change, managing diversity, facilitating workforce effectiveness, etc.

Related units in the Information competency theme in the *Working in Government* Competency field are:

PSPGOV206B Handle workplace information

PSPGOV307B Organise workplace information

PSPGOV406B Gather and analyse information

PSPGOV504B Undertake research and analysis

This is a new unit of competency, added to the *Management* Competency field of the Training Package in 2004.

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Not applicable.

Employability Skills Information

Employability skills This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in *bold italics* is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Establish the organisational context for knowledge management	1.1 The organisation's history, culture, functions, strategic direction, performance and *knowledge* resources are identified 1.2 Organisational strategies and goals that may be assisted by the development of organisational capability in *knowledge management* are identified 1.3 The current *knowledge management position* of the organisation is assessed and the *strengths and weaknesses* of its knowledge resources and activities are determined 1.4 Consultation with *stakeholders* is undertaken to raise knowledge and awareness of knowledge management and to establish knowledge management *goals* for the business unit and/or the organisation 1.5 The cultural aspects of knowledge and knowledge management are identified and explored in the context of the organisational environment
2. Develop capability in knowledge management	2.1 The *benefits* of knowledge management are identified and promoted to build an environment where these benefits may be realised 2.2 Knowledge management *initiatives* are developed and aligned with the overall organisational strategy and contribute to business unit goals 2.3 Initiatives are developed to build long-term capability in knowledge management and a culture of sharing knowledge and

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ELEMENT	PERFORMANCE CRITERIA
	creating new knowledge in the organisation
	2.4 Knowledge management initiatives are focused on the management and use of tacit knowledge in the business unit and creating new knowledge, as well as the capture and sharing of explicit knowledge
	2.5 Management and stakeholder support is built throughout knowledge management initiatives to ensure immediate successes are transformed into ongoing benefits
3. Facilitate knowledge management	3.1 Strategies are implemented to facilitate the development of strong and trusting culturally diverse networks where knowledge can be created and shared
	3.2 *Methods for creating, discovering and acquiring* knowledge are facilitated in the business unit
	3.3 *Methods and systems for capturing and storing* knowledge are promoted in accordance with *legislation, policy and procedures*
	3.4 *Methods and systems for presenting, distributing and sharing* knowledge are promoted
	3.5 *Activities for revising and disposing of* knowledge are facilitated in accordance with legislation, policy and procedures
4. Integrate aspects of knowledge management with information management	4.1 Processes for the management of explicit knowledge are integrated with the organisation's information management processes/systems to ensure efficiency and to provide wide access to explicit knowledge
	4.2 Explicit knowledge is recorded and stored in accordance with organisational and public sector standards for information/records management
	4.3 Structuring, maintaining and linking of explicit knowledge to related organisational *information* is facilitated in accordance with organisational requirements
	4.4 Knowledge and information are managed to improve their integration and use to meet business unit goals

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

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REQUIRED SKILLS AND KNOWLEDGE

Look for evidence that confirms skills in:

applying legislation, regulations and policies relating to knowledge management and information management

showing leadership and taking risks in the context of knowledge management

applying organisation and resource management techniques and methods

building strong and trusting networks

facilitating groups and learning

communicating with a diverse range of stakeholders to build knowledge management capacity

responding to diversity, including gender and disability

applying procedures relating to occupational health and safety and environment in the context of knowledge and information management

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

legislation, regulations, policies, procedures and guidelines relating to knowledge management and information management, such as privacy, freedom of information

principles of knowledge management

Australian Standard AS 5037(Int)-2003 Knowledge management

tools and techniques related to introduction of knowledge management initiatives

intersection of knowledge management with other disciplines, such as organisational learning, information management/technology, human resources management, communications

cultural aspects of knowledge and knowledge management

equal employment opportunity, equity and diversity principles

public sector legislation such as occupational health and safety and environment in the context of knowledge and information management

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* unitsthat must be achieved prior to this unit:*Nil*
- *Co-requisite* unitsthat must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to

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EVIDENCE GUIDE

	increase the efficiency and realism of the assessment process include, but are not limited to:
	PSPETHC601B Maintain and enhance confidence in public service
	PSPGOV601B Apply government systems
	PSPGOV602B Establish and maintain strategic networks
	PSPLEGN601B Manage compliance with legislation in the public sector
	PSPMNGT615A Influence workforce effectiveness
	PSPMNGT602B Manage resources
	PSPMNGT604B Manage change
	PSPMNGT605B Manage diversity
	PSPMNGT608B Manage risk
Overview of evidence requirements	In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms: • the knowledge requirements of this unit • the skill requirements of this unit • application of the Employability Skills as they relate to this unit (see Employability Summaries in Qualifications Framework) • management of knowledge and information in a range of (3 or more) contexts (or occasions, over time)
Resources required to carry out assessment	These resources include: • legislation, policy, procedures and protocols relating to knowledge management and information management • current theory and practice in knowledge management • Australian Standard AS 5037(Int)-2003 Knowledge management • case studies and workplace scenarios to capture the range of situations likely to be encountered when managing knowledge and information
Where and how to assess evidence	Valid assessment of this unit requires: • an environment that closely resembles normal work practice and replicates the range of conditions likely to be encountered when managing knowledge and information, including coping with difficulties, irregularities and breakdowns in routine • management of knowledge and information in a range of (3 or more) contexts (or occasions, over time) Assessment methods should reflect workplace demands, such as

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EVIDENCE GUIDE

literacy, and the needs of particular groups, such as:

- people with disabilities
- people from culturally and linguistically diverse backgrounds
- Aboriginal and Torres Strait Islander people
- women
- young people
- older people
- people in rural and remote locations

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

- case studies
- portfolios
- projects
- questioning
- scenarios
- authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in *italics* in the Performance Criteria is explained here.

Knowledge is

- a body of understanding and skills that is constructed by people
- increased through interaction with information (typically from other people)
- tacit - residing in the mind and may include aspects of culture or 'ways of doing things'
- explicit - when recorded as information in a document, image, film clip or some other medium AS 5037(Int)-2003

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RANGE STATEMENT

	• also sometimes identified as 'expert' knowledge, or 'entrepreneurial' knowledge • affected by experience
Knowledge management is	• a multi-disciplined approach to achieving organisational objectives by making best use of knowledge • involves the design, review and implementation of both social and technological processes to improve the application of knowledge in the collective interest of stakeholders AS 5037(Int)-2003
The organisation's current position in relation to knowledge management may include	• low literacy in knowledge management and no trust or networks developed (new organisation) • low literacy in knowledge management but well-networked staff (existing organisation) • high literacy in knowledge management but no trust or networks developed (new organisation) • high literacy in knowledge management and well-networked staff (existing organisation)
Strengths and weaknesses may relate to	• people • process • technology • content
Stakeholders may include	• all those individuals and groups both inside and outside the organisation that have some direct interest in the organisation's behaviour, actions, products and services, including: • boards of management • clients • community organisations • contractors • employees at all levels of the organisation • government • Ministers • other public sector organisations • service providers • suppliers • the public • union and association representatives • volunteers
Knowledge management goals may include	• new knowledge creation • improving knowledge utilisation • developing a community of practice in knowledge management with strong social networks

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RANGE STATEMENT

Benefits of knowledge management may include	• improved decision making • improved performance • improved productivity and organisational efficiency • retaining corporate knowledge and organisational learning • improving networking, trust and morale • increased innovation • increased motivation
Knowledge management initiatives may include	• development of knowledge management policy/strategy • knowledge management projects • mentoring in knowledge management • electronic collaboration • tools and approaches to remedy weaknesses in knowledge management or build on strengths
Methods for creating, discovering and acquiring knowledge may include	• meetings to foster innovation • employing staff or consultants with knowledge/skills not currently in the organisation for the purpose of knowledge transfer • research outside the organisation • through publications • analysis of existing and archived information • auditing/mapping of information • consulting staff in similar organisations
Methods and systems for capturing and storing knowledge may include	• traditional information management systems, such as: • files • books • journals • documentation and archives • intranets • portals • web sites • databases • electronic documents • ways of making tacit knowledge visible and available (without making it explicit and storing as above), such as advertising available expertise, providing help desk facilities • capturing learning from past activities • openness to change • drive for continual improvement
Legislation, policy and procedures may include	• State/Territory and Commonwealth legislation, regulations and guidelines relating to knowledge management and information management, such as privacy, freedom of information,

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RANGE STATEMENT

	confidentiality, security, etc • public sector management acts • codes of ethics • codes of conduct • public sector standards, such as fraud control, security management, risk control • disaster recovery
Methods and systems for presenting, distributing and sharing knowledge may include	• information management systems • intranets • files • databases • work processes where explicit knowledge is formally distributed • face-to-face meetings • providing leadership to encourage risk taking • development of trusted social networks for knowledge exchange
Activities for revising and disposing of knowledge may include	• processes to authenticate and update knowledge • processes to ensure that out-of-date or incorrect knowledge (especially tacit knowledge) is not used • processes for destruction of explicit knowledge that follow records management standards for destruction of records and public sector/legal requirements
Information is	• data in a context to which meaning has been attributed AS 5037(Int)-2003

Unit Sector(s)

Not applicable.

Competency field

Competency field Management

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PSPPM402B Manage simple projects

Modification History

Not applicable.

Unit Descriptor

Unit descriptor

This unit covers management of generally low risk projects that may be small scale and managed by one person or a person with a small team. It includes implementing project start-up activities, coordinating project implementation, monitoring the project and arranging follow-up activities. Contract management requirements are not included as this aspect is addressed by units of competency within the Competency field of *Procurement and Contract Management*.

In practice, managing simple projects overlaps with other generalist and specialist work activities such as applying government processes, using resources, gathering information, managing contracts etc.

When this unit is completed in conjunction with *PSPPM401B Design simple projects* and *PSPPM403B Close simple projects*, the three units together are equivalent to the eight private sector Business Services project management competencies: BSBPM401A - BSBPM408A inclusive.

This unit, and unit *PSPPM405A Administer simple projects*, are mutually exclusive. One or the other, but not both, may contribute to a qualification.

This unit replaces and is equivalent to *PSPPM402A Implement projects*.

Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Not applicable.

Employability Skills Information

Employability skills This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in *bold italics* is explained in the Range Statement following.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Implement start-up activities	1.1 The *project plan* is updated with confirmed information for key dates and activities, resources and project governance details in accordance with the project implementation strategy 1.2 Project *stakeholders'* understanding of and agreement to fulfil the project requirements and their roles and responsibilities are confirmed 1.3 *Required systems* are established and maintained throughout the project in accordance with the project plan 1.4 A working knowledge of *project management tools* is used to facilitate integration of project activities and achievement of project outcomes
2. Coordinate project implementation	2.1 *Integration* and *management* of project activities are handled in accordance with the project plan 2.2 Stakeholder input and expectations are managed and their commitment is maintained throughout the life of the project in accordance with organisational policy and procedures and the project plan 2.3 Disagreements and disputes are resolved or referred to a higher authority in accordance with organisational policy and procedures 2.4 Project *change proposals* are received and changes are recommended/made in accordance with the project plan, and

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ELEMENT	PERFORMANCE CRITERIA
	documented in accordance with *policy and procedures*
3. Monitor project	3.1 All aspects of the project are continually monitored and corrective action is taken as necessary to maintain progress in accordance with the project plan
	3.2 Consultation and reporting mechanisms are applied in accordance with the communication plan when dealing with management, staff and/or contractors, steering committee members or other stakeholders
	3.3 Project governance plans and any related contracts are monitored, reviewed and amended as appropriate, and results are reported in accordance with the communication plan
	3.4 Project progress is monitored against agreed milestones in accordance with the project plan to provide a measure of performance throughout the life of the contract
	3.5 Programmed review of objectives and achievement is implemented in accordance with the project plan
4. Arrange project follow-up activities	4.1 Project deliverables are analysed against *specifications*, performance standards and project objectives, under broad guidance, and the results are reported to stakeholders
	4.2 An initial support package or product manual is produced, if required, to provide guidance for stakeholders who will be required to apply the project results
	4.3 The support package includes options for stakeholders to take account of environmental and cultural factors in applying project results
	4.4 Operational and support authorities are consulted to research any testing/trialling/building requirements resulting from the project, and evaluation of any recommendations are included in the project report

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

leading and mentoring people to achieve project deliverables

maintaining agreement of stakeholders and team members to timelines, roles and

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REQUIRED SKILLS AND KNOWLEDGE

responsibilities

communicating with stakeholders and team members using a range of communication styles to suit different audiences and purposes

responding to diversity, including gender and disability

using project management tools applicable to small scale or low risk projects

applying ethical decision making and problem solving related to project management of small scale or low risk projects

writing recommendations and preparing implementation support packages requiring precision of expression

applying workplace safety procedures in line with project requirements

accessing/preparing information electronically or in hard copy

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

legislation, organisational policies and procedures that may impact on project management, for example:

public sector codes of ethics/conduct

occupational health and safety and environment requirements

project governance requirements

quality standards

risk management

procurement guidelines

human resources

equal employment opportunity, equity and diversity principles

project management tools to suit a range of small scale or low risk projects

project management principles

organisational and political context

Evidence Guide

EVIDENCE GUIDE

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together

- *Pre-requisite* unitsthat must be achieved prior to this unit:*Nil*
- *Co-requisite* unitsthat must be assessed with this unit:*Nil*
- *Co-assessed units* that may be assessed with this unit to

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EVIDENCE GUIDE

	increase the efficiency and realism of the assessment process include, but are not limited to: PSPETHC401A Uphold and support the values and principles of public service PSPGOV402B Deliver and monitor service to clients PSPGOV403B Use resources to achieve work unit goals PSPGOV411A Deal with conflict PSPGOV412A Use advanced workplace communication strategies PSPGOV422A Apply government processes PSPLEGN401A Encourage compliance with legislation in the public sector PSPPROC410A Administer contracts PSPPM401B Design simple projects PSPPM403B Close simple projects • *Excluded units* that <u>may not</u> contribute to the same qualification as this unit: PSPPM405A Administer simple projects
Overview of evidence requirements	In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms: • the knowledge requirements of this unit • the skill requirements of this unit • application of the Employability Skills as they relate to this unit (see Employability Summaries in Qualifications Framework) • simple projects managed in a range of (3 or more) contexts (or occasions, over time)
Resources required to carry out assessment	These resources include: • legislation, guidelines, procedures and protocols relating to project management • workplace project documentation • scenarios and case studies • examples of project management tools
Where and how to assess evidence	Valid assessment of this unit requires: • a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when implementing projects, including coping with difficulties, irregularities and breakdowns in routine • simple projects managed in a range of (3 or more) contexts (or

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EVIDENCE GUIDE

	occasions, over time) Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as: • people with disabilities • people from culturally and linguistically diverse backgrounds • Aboriginal and Torres Strait Islander people • women • young people • older people • people in rural and remote locations Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of: • case studies • demonstration • portfolios • questioning • scenarios • authenticated evidence from the workplace and/or training courses
For consistency of assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in *italics* in the Performance Criteria is explained here.

Project plan will include some or all of	• acquisition strategies • budget and financial management strategy • contract management • cost estimates • evaluation criteria

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RANGE STATEMENT

- expected outcomes/measurable benefits of the project
- facilities
- inclusions and exclusions from project
- information/communication strategy
- intellectual property strategies
- milestones
- objectives
- outputs/project deliverables and their acceptance criteria
- people plan including human resource management and human resource development
- performance criteria/indicators
- project control mechanisms
- project implementation strategy
- project governance strategy
- purpose
- quality assurance
- quality control
- quality standards for project
- rationale
- required project resources
- resource management
- risk management
- roles and responsibilities
- schedule/timeline
- task/work breakdown structure (WBS)

Stakeholders may include

- project sponsor/funding bodies
- clients or customers (internal and external)
- industry
- other agencies
- general public
- relevant interest groups
- unions
- functional areas
- the organisation's senior management
- Ministers
- project team
- steering committee members
- end user
- supplier/service provider

Required systems for

- planning and monitoring system

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RANGE STATEMENT

project management may include	• financial management including: • budget allocation/funding • income generated • expenditure • recordkeeping for documented information such as: • correspondence • quality data including survey, needs, test results • contracts • time allocated and spent on each aspect of the project • progress reports • performance reports against milestones • project outcomes • samples, prototypes, models
Project management tools may include	• risk analysis • organisational project governance framework • communications plan • reporting framework • project management software and other tools: • Gantt and bar charts • Program Evaluation and Review Technique (PERT) charts • Critical Path Method • cost schedule control system • logistics support analysis • life cycle cost analysis • spreadsheets • recording systems - electronic and manual
Integration of project activities may include	• scope • time • cost • quality • human resources • communications • risk • procurement
Management may include	• scope management • communication and reporting • schedule management • financial management • quality management • resources management

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RANGE STATEMENT

	• people management • logistics management • risk management • contract management • change management
Change proposals may include	• scope • administration • engineering, technical, technology changes • time • cost • resources
Policy and procedures may include	• government legislation (Federal, State and Local) affecting organisation's administration such as: • public sector management acts • financial management and accounting legislation and regulations • privacy legislation • government and organisational guidelines and procedures relating to: • project governance • resourcing • security • strategic plans • recruitment • risk management • procurement guidelines • designation approvals • industrial agreements
Specifications may include	• functional • technical • performance • material

Unit Sector(s)

Not applicable.

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Competency field

Competency field Project Management

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PSPPROC406B Procure goods and services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit covers the expenditure of public monies for simple procurement of low value/low risk goods and services using contractual arrangements that include simple tendering and requests for quotation. The unit requires analysis and decision making in the procurement process, which is undertaken under limited supervision. It includes planning and undertaking procurement, managing contractors and completing contractual arrangements. In practice, procuring goods and services overlaps with other generalist and specialist public sector or local government work activities, such as upholding and supporting the values and principles of public service, identifying and treating risks, exercising delegations, applying government processes, encouraging compliance with legislation in the public sector or local government, planning procurement, developing and distributing requests for offers, selecting providers and managing contracts. This unit is not recommended for those who specialise in procurement. It cannot be included in the Certificate IV in Government (Procurement and Contracting). No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to those who enter into contracts or go out to tender or manage the procurement but are not procurement professionals. Those undertaking this unit may be developing a request for tender but procurement is not a major part of their role.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. **Plan for procurement of goods or services**.	1.1. ***Market assessment*** is used to identify and select options for procuring goods or services in accordance with business plan requirements, legislation, policy and procedures, and ***probity requirements***. 1.2. ***Commercial strategy*** is identified to achieve the procurement outcome set out in the business plan, achieve value for money, and meet legal and probity requirements. 1.3. Risk planning is conducted for the procurement activity according to procedures, delegations and guidelines.

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ELEMENT	PERFORMANCE CRITERIA
	1.4. Process and criteria for evaluation of offers from suppliers or service providers are identified to meet public sector probity requirements, and are recorded in a tender evaluation plan. 1.5. Procurement plan is developed to manage procurement process and ***contractual arrangements*** in accordance with ***legislation***, ***policy and procedures***, ***and probity requirements***. 1.6. ***Stakeholders*** are consulted about the planned procurement and their feedback is incorporated into the procurement process.
2. **Undertake procurement**.	2.1. ***Method for requesting and receiving offers*** is chosen to suit the procurement activity and comply with organisational policy and procedures and probity requirements. 2.2. Specialist expertise is used to assist in evaluation of offers as required. 2.3. Evaluation and selection of the offer are made according to tender evaluation plan, and organisational policy and procedures. 2.4. Notification of successful and unsuccessful suppliers/providers is undertaken according to procurement plan, and organisational policy and procedures. 2.5. Work does not commence and payment is not made until contractual arrangements are formalised. 2.6. Contractual arrangements that are legally binding to all parties and suitable to the procurement activity are negotiated, formalised and ***reported*** according to organisational policy and procedures.
3. **Manage contractors**.	3.1. Communication strategies are established to build and maintain relationships with contractors. 3.2. Performance is monitored against contract performance indicators for quality assurance of the goods or services and to ensure compliance with contract specifications. 3.3. Contract performance indicators are regularly reviewed to ensure relevance. 3.4. Approvals are obtained for contract variations according to organisational and contractual requirements. 3.5. Disputes or complaints are investigated, documented and resolved or referred according to contractual

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ELEMENT	PERFORMANCE CRITERIA
	provisions. 3.6. Contractual obligations to contractors are met. 3.7. ***Records*** are maintained according to organisational and legal requirements to provide an audit trail and for other ***organisational purposes***.
4. **Complete contractual arrangements**.	4.1. Goods and services received are confirmed as meeting contractual specification and required outcome, and accounts are processed for payment according to organisational procedures. 4.2. Contracts are finalised, cancelled or terminated according to contractual arrangements. 4.3. Contract performance, outcomes and management processes are evaluated, and lessons learnt are recorded and used to inform ongoing contract management practices.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - write procurement specifications in unambiguous terms
  - consult and negotiate with providers
  - write, read and/or sign contractual agreements that may include complexity of language and style, using templates where appropriate
  - engage in ongoing communication with contractors that may involve explaining or clarifying written and oral information, note-taking at meetings, active listening, and checking for understanding
  - provide feedback
- teamwork skills to:
  - work independently or under direction as appropriate to the situation
  - model team leadership approaches if appropriate
  - respond to diversity
  - refer issues to the correct person
- problem-solving skills to:
  - evaluate procurement options and select the most suitable option

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REQUIRED SKILLS AND KNOWLEDGE

• assess goods or services provided against specifications
• initiative and enterprise skills to apply OHS, environmental, sustainability and corporate social responsibility practices in the context of government procurement activities
• planning and organising skills to:
  • manage contractor performance against contract requirements
  • make payments and manage financial arrangements
• learning skills to keep up-to-date with relevant procurement legislation, policies and procedures
• technology skills to:
  • operate organisational IT systems
  • use electronic procurement templates

Required knowledge

• commonwealth, state or territory, and local government legislation, policies, practices and guidelines:
  • relating to contract management, including environmental purchasing and corporate social responsibility guidance
  • such as OHS and equity and diversity
• organisational procurement policies, practices and approval processes
• organisation's code of conduct and code of ethics
• procurement options and methods
• probity and ethical issues
• codes of conduct, codes of practice and standards of individual behaviour relating to procuring goods and services, in particular identifying and managing conflict of interest, gifts and inappropriate relationships with providers
• procedures for receipt and payment of goods or services
• common use arrangements
• procurement approval procedures
• financial accountability requirements
• aspects of contract law, laws of tort, trade practices law, commercial law and other legislation relating to receipt and evaluation of offers, negotiation and award of contracts

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	Competency must be demonstrated in the ability to procure goods and services consistently in accordance with legislative and organisational requirements.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Assessment must confirm the ability to: • plan a procurement activity, using templates where these are available, to a level of detail commensurate with the complexity and risk profile of the procurement • implement the procurement plan in a way that reflects the legislative and policy environment applicable to the organisation • develop a suitable contract management plan, using templates if available • manage the performance of contractors to ensure that the goods or services are delivered in accordance with the contract • act within own delegations and refer issues to higher authority when necessary. **Consistency in performance** Competency should be demonstrated by providing evidence of undertaking a range of relevant work tasks in an actual or simulated procurement environment on at least two separate occasions.
Context of and specific resources for assessment	The unit of competency is to be assessed in the workplace or a simulated workplace environment. Access may be required to: • legislation, policy, procedures and protocols relating to procuring goods and services • codes of conduct and codes of practice • workplace scenarios and case studies relating to a range of procurement activities • case studies that incorporate dilemmas, and probity requirements relating to procurement of goods and services.
Method of assessment	The following assessment methods are suggested: • questions to assess understanding of relevant legislation and procedures • review of strategies selected for procurement • review of procurement plans, requests for quotation/tender, tender evaluation plans, selection reports, contracts, contract

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EVIDENCE GUIDE	
	management plans and reports, and other documentation prepared by the candidate in a range of contexts • feedback from peers or supervisors on actions taken to monitor and review contract performance. In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. Questioning techniques should suit the language and literacy levels of the candidate.
Guidance information for assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • PSPETHC401A Uphold and support the values and principles of public service • PSPGOV417A Identify and treat risks • PSPGOV421A Exercise delegations • PSPLEGN401A Encourage compliance with legislation in the public sector • PSPPROC411A Plan procurement • PSPPROC412A Develop and distribute requests for offers • PSPPROC413A Select providers and develop contracts • PSPPROC414A Manage contracts.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Market assessment may include:	• structure of the market • number and quality of providers • factors and conditions which may affect supply of goods or provision of services

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RANGE STATEMENT	
	• potential impact of intended procurement activity.
Evaluation of options may include:	• stakeholder consultation • confirmation that procurement is necessary • development of a business case • comparison of internal and outsourced provision.

Probity requirements:	• may include:
	  • accountability
	  • transparency
	  • confidentiality
	  • managing conflict of interest
	  • impartiality
	• are maintained to:
	  • encourage conformity to processes
	  • facilitate accountability
	  • ensure proponents are treated in a fair and equitable manner
	  • encourage commercial completion
	  • preserve public and private sector confidence in government processes.

Key elements of a ***commercial strategy*** may include:	• consultation with key stakeholders • expenditure budget meets organisational requirements for probity and accountability • procurement process agreed by users and documented, and meets legal and probity requirements • approvals obtained • contractual arrangements that capture and address identified risks, protection of all parties, and include performance indicators that provide the basis for due performance.
Contractual arrangements may include:	• verbal and written orders • purchase order • government credit cards • petty cash • memoranda of understanding/memoranda of agreement • in-house service level agreements • contracts • standing offers • inter and intra-government agreements.
Legislation, ***policy and***	• commonwealth or state and territory legislation

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RANGE STATEMENT	
procedures and probity requirements may include:	• council rules and by-laws • equal employment opportunity and anti-discrimination law • commonwealth, and state or territory government procurement guidelines, including environmental purchasing guidelines • organisational policies and practices • probity guidelines • financial management requirements.
Stakeholders may include:	• end users, customers or clients, and sponsors • current or potential providers or suppliers • technical or functional experts or advisers • commonwealth, state or territory, and local government • the organisation • other public sector organisations • employees, unions and staff associations • industry bodies • local communities • lobby groups and special user groups.
Methods for requesting and receiving offers may include:	• requests for quotation • direct purchases using existing supply agreements, such as standing offers • oral quotations • written quotations • direct purchases from retail or wholesale outlets • electronic commerce.
Reporting may include:	• gazettal notices • public notification • Gazette Publishing System (GaPS) • electronic • verbal • annual reports • internal and/or external • statistical reports.
Records may include:	• purchase requests and orders • simple procurement submissions and proposals • invoices and payment requests • statements and petty cash vouchers • offer and contract documents • evaluation process documentation

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RANGE STATEMENT	
	• records of authorised decisions • corporate credit card transaction statements • records of supplier performance • gazettal notices • financial statements • asset registers • records of conversation • actions taken to manage identified conflict of interest.
Organisational purposes may include:	• reports and other documents • future procurement planning and contract management • accountability requirements • Ministerials.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Procurement and Contract Management

Co-requisite units

Co-requisite units	

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PSPPROC407A Establish procurement need

Modification History

Unit Descriptor

This unit covers the establishment, justification and approval of procurement requirements to achieve required outcome. It includes defining and justifying the need, researching potential impact and risks, and securing organisational support to proceed with procurement activity.

The unit is suitable for any personnel who identify the need for procurement, and would not necessarily apply to procurement specialists whose role would typically begin as a result of procurement need being established and approved (including approval of appropriation).

In practice, establishment of procurement need may overlap with other public sector generalist and specialist work activities such as acting ethically, complying with legislation, applying government processes, working with diversity, using resources, etc.

This unit replaces **PSPPROC401A Plan procurement.** The units are not equivalent, as overlap between PSPPROC401A and PSPPROC402A has been removed, and the unit is more tightly focused on pre-procurement planning.

There is multi-unit equivalence between new and superseded units. The combination of:

PSPPROC401A Plan procurement + PSPPROC402A Request and receive offers+ PSPPROC403A Award contracts

is equivalent to the combination:

PSPPROC408A Develop requests for offersPSPPROC409A Receive and select offers

Application of the Unit

Licensing/Regulatory Information

Pre-Requisites

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in **bold italics** is explained in the Range Statement following.

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Elements and Performance Criteria

Elements and Performance Criteria

Element	Performance Criteria
1 **Define and justify procurement need**	1.1 Consultation is undertaken with **stakeholders** and experts to determine whether viable alternatives to procurement exist to address identified procurement need
	1.2 A representative sampling of clients, experts and **suppliers** is consulted to define and clarify requirements
	1.3 Procurement need is justified through consultation and negotiation with stakeholders and **experts**
	1.4 Other **issues and opportunities** are investigated for integration into procurement activity
2 **Research potential procurement impact and risks**	2.1 Options are developed and the impacts, risks and costs of each are determined
	2.2 Recommendation is made and justified
	2.3 Identification and assessment of risks are undertaken using risk analysis tools that meet policy guidelines
	2.4 Stakeholder input is obtained and taken into account in the development of the procurement requirement
	2.5 Procurement requirement is developed which contains risk analysis, outcome measures, responsibilities and timelines
	2.6 Procurement requirement is outlined from transition to close-out, and meets **legislative, policy and probity requirements**
3 **Secure organisational support for procurement**	3.1 Constraints or limitations of authority and approval requirements are identified
	3.2 **Resource** allocations and **appropriation** are confirmed for whole-of-life
	3.3 Approvals are obtained in accordance with procedures, guidelines and delegations

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3.4 Procurement requirement is conveyed to procurement specialists for development of procurement planning and implementation

3.5 Value for money criteria are defined for assessment and measurement of performance

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

undertaking research, planning and analysis of issues relating to procurement need

making comparisons, justifying a point of view and providing supporting evidence

consulting with stakeholders involving oral and written exchanges of sometimes complex information

responding to diversity, including gender and disability

writing a procurement requirement that may require complexity of language and style, yet still be expressed in unambiguous terms

applying occupational health and safety and environmental requirements in the context of establishing procurement needs

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

Commonwealth/State/Territory Government legislation, policies, practices and guidelines relating to contract management, including environmental purchasing guidelines

procurement policies, practices and approval processes

probity principles and issues

ethical issues relating to procurement

life cycle costs

whole-of-life considerations

technical knowledge

aspects of law of contract, laws of tort, trade practices law, commercial law and other legislation relating to receipt and evaluation of offers, negotiation and award of contracts

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equal employment opportunity, equity and diversity principles

public sector legislation including occupational health and safety and environment

Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together	**Pre-requisite units** that **must** be achieved **prior** to this unit: **Nil** **Co-requisite units** that **must** be assessed **with** this unit: **Nil** **Co-assessed units** that **may** be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to: PSPETHC401A Uphold and support the values and principles of public service PSPGOV406B Gather and analyse information PSPGOV422A Apply government processes PSPLEGN401A Encourage compliance with legislation in the public sector PSPPOL404A Support policy implementation PSPPROC408A Develop requests for offers PSPPROC409A Receive and select offers
Overview of evidence requirements	In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms: the knowledge requirements of this unit the skill requirements of this unit application of the Employability Skills as they relate to this unit (see Employability Summaries in Qualifications Framework) exercise of responsible care in planning the

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	use of public monies establishment of procurement need in a range of (2 or more) contexts (or occasions, over time)
Resources required to carry out assessment	These resources include: legislation, policy, procedures and protocols relating to establishment of procurement needs case studies and workplace scenarios to capture the range of situations likely to be encountered
Where and how to assess evidence	Valid assessment of this unit requires: a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when establishing procurement need, including coping with difficulties, irregularities and breakdowns in routine establishment of procurement need in a range of (2 or more) contexts (or occasions, over time) Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as: people with disabilities people from culturally and linguistically diverse backgrounds Aboriginal and Torres Strait Islander people women young people older people people in rural and remote locations Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of: case studies portfolios projects

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	questioning
	scenarios
	simulation or role plays
	authenticated evidence from the workplace and/or training courses
For consistency of assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in **italics** in the Performance Criteria is explained here.

Stakeholders may include	end users, customers or clients and sponsors
	potential providers or suppliers
	current providers/suppliers
	technical or functional experts or advisers
	Federal, State/Territory and/or Local Government
	the organisation
	other public sector organisations
	employees, unions or staff associations
	industry bodies
	local communities and society as a whole
	lobby groups, special user groups
Suppliers may include	commercial organisations
	other government organisations
	commercialised or privatised government

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	organisations
	non-profit organisations
Experts may include	legal, functional, technical, financial
	scientific and research
	human resource
	commercial or business practices
	consultants
	other relevant organisations including foreign governments
Issues and opportunities may include	risk sharing
	cost sharing
	cost escalation
	intellectual property rights
	knowledge management
	corporate knowledge
	libraries, archives - historical value of public sector work
	capital equipment/asset ownership
	value engineering
	value management
	innovation
	continuous improvement
	future organisational requirements
	quality
	whole-of-life considerations
	organisational integration and cooperation
Legislative, policy and probity requirements may include	Commonwealth or State/Territory legislation
	equal employment opportunity and anti-discrimination law
	Commonwealth/State/Territory Government procurement guidelines including environmental purchasing, access and equity, social justice guidelines
	organisational policies and practices

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	security/confidentiality
	risk management
Resource requirements may include	facilities
	information technology
	personnel
	budget support equipment
	use of contractor staff
	professional service providers
	risk assessment
Appropriations may require	Ministerial authorisation
	compliance with instructions or finance circulars
	confirmation by chief financial officer
	special consideration if they concern:
	long-term travel deals
	long-term computer deals
	long-term lease deals
	issuing of indemnities

Unit Sector(s)

Competency field

Procurement&Contract Management

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PSPPROC408A Develop requests for offers

Modification History

Unit Descriptor

This unit covers the development and dissemination of a request for offers to fulfil procurement requirements. It includes interpretation of procurement requirements, planning procurement activities, specifying the requirement, and developing a procurement plan and the formal request for offers.

In practice, developing requests for offers may overlap with other public sector generalist and specialist work activities such as acting ethically, complying with legislation, applying government processes, working with diversity, gathering and analysing information, etc.

This unit replaces **PSPPROC402A Request and receive offers**. The units are not equivalent.

There is however, multi-unit equivalence between new and superseded units. The combination of:

PSPPROC401A Plan procurement PSPPROC402A Request and receive offersPSPPROC403A Award contracts

is equivalent to the combination:

PSPPROC408A Develop requests for offersPSPPROC409A Receive and select offers

Application of the Unit

Licensing/Regulatory Information

Pre-Requisites

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in **bold italics** is explained in the Range Statement following.

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Elements and Performance Criteria

Elements and Performance Criteria

Element	Performance Criteria
1 **Interpret procurement requirements**	1.1 Procurement approvals and **appropriation/s** are confirmed for whole-of-life of the activity
	1.2 Procurement requirements are re-confirmed with all parties
	1.3 A representative sampling of clients, experts and **suppliers** is consulted to further define and clarify requirements
	1.4 A market analysis is used to identify **factors** that may impact on procurement decisions
	1.5 **Sources of supply** are accessed to determine possible providers and any conflict of interest is identified and resolved
	1.6 Supplier referencing/positioning or viability analysis is conducted
2 **Plan procurement activities**	2.1 Business cost estimates are prepared to select a procurement method most suitable for the procurement activity and most likely to achieve a value for money outcome
	2.2 Approvals are obtained for method of procurement
	2.3 Resource requirements are confirmed and committed in a timely manner and responsible authorities are nominated
	2.4 Relationships and dependencies between various procurement activities are determined
	2.5 2.6 Strategies for briefing potential bidders are included when required, and meet public sector standards and organisational protocols
3 **Specify procurement requirement**	3.1 Scoping of the requirement is undertaken to identify outcomes, objectives and **logistics**
	3.2 **Standards of performance**, incentives, disincentives and performance measures are specified

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		3.3 A statement of requirement is prepared that meets organisational requirements for format and content and is acceptable to stakeholders
		3.4 The needs of clients and end users are incorporated and the outcome is achievable by potential providers
		3.5 Planned provider contract arrangements are specified in accordance with policy and guidelines
4	**Develop a procurement plan**	4.1 The **procurement plan** is developed in accordance with organisational procedures and procurement requirements
		4.2 **Criteria** and process for evaluation of offers are selected to meet legal and policy requirements, and are practical and measurable
		4.3 Where used, **specialist expertise** to evaluate offers and the structure/membership of evaluation panel is arranged in accordance with organisational procedures
		4.4 Practical strategies are selected for informing or debriefing successful and unsuccessful bidders and the market, in accordance with organisational guidelines and public sector standards
5	**Develop request for offers**	5.1 **Request for offers** and contractual conditions are developed that are suitable for the procurement activity, and are clarified with clients, providers and/or experts as necessary
		5.2 Request for offers is developed in accordance with a procurement plan, clearly outlines the procurement requirement and meets legal and probity requirements
		5.3 When possible/appropriate, **input** on content and structure of request for offer documents is obtained from market
		5.4 Approvals are obtained to approach the market place in accordance with organisational policy and procedures
		5.5 Records documenting the request, and for seeking, processing and closing of **offers,** are maintained in

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accordance with organisational procedures and legal requirements

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

using effective communication with stakeholders, specialists and providers involving oral and written exchanges of sometimes complex information

reading and applying complex documents such as contracts, legislation and guidelines

writing requests for offers which may include complexity of language and style, yet expressed in unambiguous terms

responding to diversity, including gender and disability

applying occupational health and safety and environmental requirements in the context of developing requests for procurement offers

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

Commonwealth/State/Territory Government legislation, policies, practices and guidelines relating to requests for offers, including environmental purchasing guidelines

procurement policies, practices and approval processes

probity principles and issues

ethical issues related to developing requests for offers

issues to be considered in the development of request for tenders

aspects of law of contract, laws of tort, trade practices law, commercial law and other legislation relating to requests for offers

equal employment opportunity, equity and diversity principles

public sector legislation including occupational health and safety and environment

Evidence Guide

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The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together	**Pre-requisite units** that **must** be achieved **prior** to this unit: **Nil** **Co-requisite units** that **must** be assessed **with** this unit: **Nil** **Co-assessed units** that **may** be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to: PSPETHC401A Uphold and support the values and principles of public service PSPGOV406B Gather and analyse information PSPGOV412A Use advanced workplace communication strategies PSPGOV422A Apply government processes PSPLEGN401A Encourage compliance with legislation in the public sector PSPPOL404A Support policy implementation PSPPROC409A Receive and select offers
Overview of evidence requirements	In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms: the knowledge requirements of this unit the skill requirements of this unit application of the Employability Skills as they relate to this unit (see Employability Summaries in Qualifications Framework) requests for offers developed in a range of (3 or more) contexts (or occasions, over time)
Resources required to carry out assessment	These resources include: legislation, policy, procedures and protocols relating to requests for offers case studies and workplace scenarios to capture the range of situations likely to be

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encountered when developing requests for offers

Where and how to assess evidence

Valid assessment of this unit requires:

a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when developing requests for offers, including coping with difficulties, irregularities and breakdowns in routine

requests for offers developed in a range of (3 or more) contexts (or occasions, over time)

Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

people with disabilities

people from culturally and linguistically diverse backgrounds

Aboriginal and Torres Strait Islander people

women

young people

older people

people in rural and remote locations

Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of:

case studies

demonstration

portfolios

projects

questioning

scenarios

simulation or role plays

authenticated evidence from the workplace and/or training courses

For consistency of assessment

Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the

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	competency in different situations or environments

Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in **italics** in the Performance Criteria is explained here.

Appropriations may require	Ministerial authorisation
	compliance with instructions or finance circulars
	confirmation by chief financial officer
	special consideration if they concern:
	long-term travel deals
	long-term computer deals
	long-term lease deals
	issuing of indemnities
Suppliers may include	commercial organisations
	other government organisations
	commercialised or privatised government organisations
	non-profit organisations
Market factors which impact on procurement decisions may include	structure of and key 'players' in the market
	market capability
	market maturity
	market strength
	factors/conditions which may affect supply
	potential impact of intended contracting activity
Information on sources of supply may	yellow pages

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include	buyers guides, supplier brochures and advertisements
	purchasing contract awareness service
	suppliers' previous histories and files
	peer, supplier and customer networks
	computer aided purchase of computers
	newspapers, journals, bulletins or directories
	endorsed suppliers arrangements
	Industry Capability Network
	Internet
	Gazette Publishing System (GaPS)
Logistics may include	phases or stages of the procurement activity
	timeframes
	milestones
	payment schedule
	targets
	outputs
	levels of service
Standards of performance may include	value for money
	quality measures
	benchmarks
	milestones/timeframes
	performance indicators
Procurement plan may include	bid evaluation plan
	contract negotiation plan
	risk management plan
	probity plan
	copy of request for offer as agreed and approved for release
Criteria for evaluation may include	value for money
	demonstrated capacity to deliver outcomes
	available expertise
	project management expertise to deliver the

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	outcomes on time and within budget
	meeting specific policy requirements such as buying locally, environmental sustainability etc
	innovation
Specialist expertise may include	legal
	financial
	economic
	technical
	probity
Requests for offers may include	invitations to submit:
	a tender
	a proposal
	a quotation
	an expression of interest
Input may be obtained via	exposure draft of request for offer
Offers may include	tenders
	written quotations
	proposals
	expressions of interest
Offers may be requested and provided using a variety of forms including	paper (such as traditional tender documentation)
	computer disk
	electronic (such as Internet, email, facsimile, Commonwealth Electronic Tendering System)

Unit Sector(s)

Competency field

Procurement&Contract Management

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PSPPROC409A Receive and select offers

Modification History

Unit Descriptor

This unit covers the receiving and selecting of offers as a result of a formal request for offer process. It includes receipt and evaluation managing the distribution and receipt of offers, selecting preferred providers, formalising contractual arrangements, and debriefing the market and other stakeholders.

In practice, receiving and selecting offers may overlap with other public sector generalist and specialist work activities such as acting ethically, complying with legislation, applying government processes, working with diversity, using resources, etc.

This unit replaces **PSPPROC403A Award contracts**. The units are not equivalent, as receipt of requests has been added.

There is however, multi-unit equivalence between new and superseded units. The combination of:

PSPPROC401A Plan procurement + PSPPROC402A Request and receive offers+ PSPPROC403A Award contracts

is equivalent to the combination:

PSPPROC408A Develop requests for offers+ PSPPROC409A Receive and select offers

Application of the Unit

Licensing/Regulatory Information

Pre-Requisites

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in **bold italics** is explained in the Range Statement following.

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Elements and Performance Criteria

Elements and Performance Criteria

Element	Performance Criteria
1 **Manage distribution and receipt of offers**	1.1 Dissemination of **request for offers** is actioned in accordance with organisational procedures and guidelines, and meets public sector standards
	1.2 Briefings and clarification of information in the request for offer are undertaken as required in accordance with procurement plan, organisational procedures, guidelines and public sector standards
	1.3 Offers are received in accordance with organisational procedures, guidelines and public sector standards
	1.4 **Probity** issues in closing offers are observed
	1.5 Late offers and non-conforming bids are dealt with in accordance with procurement plan and request for offer documentation
2 **Select preferred provider/s**	2.1 Evaluation panel is coordinated and specialist expertise is obtained where necessary to assist with evaluation of offers
	2.2 **Offers** are **evaluated** in accordance with procurement plan, organisational probity requirements and public sector standards
	2.3 Clarification and negotiation of matters contained in offers, are undertaken with bidders in accordance with organisational guidelines and public sector standards
	2.4 Preferred provider/s are selected and recommendations for **allocation of business** are developed, justified and documented against selection criteria in accordance with policy and procedures and governance requirements
	2.5 Approvals are obtained for the recommended offer/s
	2.6 Successful provider/s are notified in accordance with organisational protocols

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3	**Formalise contractual arrangements**	3.1 Approvals are obtained to enter negotiations, when required, and negotiation of the final wording of the **contract** is conducted in accordance with organisational policy and procedures and defined probity frameworks as set out in the evaluation plan
		3.2 Approvals to enter into contract/s are obtained in accordance with policy and procedures
		3.3 No commitments are made and contractors do not commence until contracts are signed
		3.4 Contracts are entered into that are valid and legally binding to the parties
		3.5 Contracts are structured to capture and address identified risks, protect both parties, and provide the basis for due performance
		3.6 Advice on the contractual arrangements is provided to stakeholders in accordance with organisational policy and procedures
4	**Debrief market and other stakeholders**	4.1 Unsuccessful bidders are informed and debriefed with constructive feedback on their proposals upon request
		4.2 Details of successful provider/s are made public in accordance with probity requirements, organisational protocols and public sector standards

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

using communication and negotiation with contractors and other stakeholders involving complex oral and written exchanges

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networking, within probity boundaries, with diverse clients, contractors and end users

responding to diversity, including gender and disability

reading and applying complex documents such as contracts, legislation and guidelines and ensuring legal and probity officers are satisfied

analysing and comparing written information to ensure key elements from the specification and procurement plan are captured in the written contract

applying occupational health and safety and environmental requirements in the context of receiving and selecting offers

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

Commonwealth/State/Territory Government legislation, policies, practices and guidelines relating to award of contracts, including environmental purchasing guidelines

procurement policies, practices and approval processes

probity principles and issues

ethical issues related to receipt and selection of offers

aspects of law of contract, laws of tort, trade practices law, commercial law and other legislation relating to receipt and evaluation of offers, negotiation and award of contracts

equal employment opportunity, equity and diversity principles

public sector legislation including occupational health and safety and environment

Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together	**Pre-requisite units** that **must** be achieved **prior** to this unit: **Nil** **Co-requisite units** that **must** be assessed **with** this unit: **Nil** **Co-assessed units** that **may** be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to: PSPETHC401A Uphold and support the values and principles of public service

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	PSPGOV406B Gather and analyse information PSPGOV422A Apply government processes PSPLEGN401A Encourage compliance with legislation in the public sector PSPPOL404A Support policy implementation PSPPROC407A Establish procurement need PSPPROC408A Develop requests for offers
Overview of evidence requirements	In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms: the knowledge requirements of this unit the skill requirements of this unit application of the Employability Skills as they relate to this unit (see Employability Summaries in Qualifications Framework) receipt and selection of offers in a range of (3 or more) contexts (or occasions, over time)
Resources required to carry out assessment	These resources include: legislation, policy, procedures and protocols relating to receiving and selecting offers case studies and workplace scenarios to capture the range of contracting situations likely to be encountered
Where and how to assess evidence	Valid assessment of this unit requires: a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when receiving and selecting offers, including coping with difficulties, irregularities and breakdowns in routine receipt and selection of offers in a range of (3 or more) contexts (or occasions, over time) Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as:

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	people with disabilities people from culturally and linguistically diverse backgrounds Aboriginal and Torres Strait Islander people women young people older people people in rural and remote locations Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of: case studies demonstration portfolios questioning scenarios simulation or role plays authenticated evidence from the workplace and/or training courses
For consistency of assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in **italics** in the Performance Criteria is explained here.

Request for offers may include	invitations to submit:

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	a tender
	a proposal
	a quotation
	an expression of interest
Requests for offers must incorporate	elements necessary to make proper offer
	lodgment procedures
	information to be supplied by bidder
	draft contracts
	general/special conditions of contracts
	specifications
	terms and conditions
Probity principles are	accountability
	transparency
	confidentiality
	management of conflicts of interest
	maintained to:
	ensure conformity to processes
	facilitate accountability
	ensure proponents are treated in a fair and equitable manner
	encourage commercial competition
	preserve public and private sector confidence in government processes
Offers may include	delivery of goods for use or into store
	provision of services
	maintenance agreements
	leasing agreements
	consultancies
	research and development
Evaluation must include	processing offers
	determining value for money
	checking/investigation
	collation of information

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	comparative statements
	accountability
	and may include staged procurement
Allocation of business may include	many successful bidders
	many contracts as a result of a single request for offer
Contracts may include	memoranda of understanding/memoranda of agreement
	in-house option directives
	common use arrangements/standing offers
	inter/intra-government agreements
	deeds of agreement

Unit Sector(s)

Competency field

Procurement&Contract Management

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PSPPROC410A Administer contracts

Modification History

Unit Descriptor

This unit covers the administration of contracts by officers who administer contracts as part of their role, rather than as their primary role. They are not specialist contract managers.

Specialist contract managers are catered for by the units PSPPROC501A - 504A, added to the **Procurement&Contract Management** Competency field of the Training Package in 2004, which address in depth the aspects of contract management performed by specialist contract managers.

NB: **PSPPROC404A Manage contracts** (from PSP99) is equivalent to the three units:

PSPPROC502A Establish contract management arrangements + PSPPROC503A Manage contract performance + PSPPROC504A Finalise contracts

This unit includes undertaking preparations, establishing and maintaining contract administration arrangements, monitoring and maintaining contract performance, and completing and reviewing contracts.

In practice, administration of contracts overlaps with other public sector generalist and specialist work activities such as acting ethically, complying with legislation, applying government processes, working with diversity, using resources, etc.

This is a new unit of competency added to the **Procurement&Contract Management** Competency field of the Training Package in 2004.

Application of the Unit

Licensing/Regulatory Information

Pre-Requisites

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in **bold italics** is explained in the Range Statement following.

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Elements and Performance Criteria

Elements and Performance Criteria

Element	Performance Criteria
1 **Prepare to administer a contract**	1.1 **Contract** requirements, approvals and funding arrangements are confirmed and clarified where necessary, and obligations and limits of authority as contract administrator are identified in line with contractual and organisational requirements
	1.2 Operational elements of the contract are confirmed and contact is made with **specialists** to clarify and assist with contract administration issues
	1.3 **Key contract clauses** are identified and their content is clarified as necessary to ensure contract requirements are understood
	1.4 The process, timings, and key performance indicators are identified from the contract and confirmed with stakeholders
	1.5 **Risks** are confirmed and a risk management plan is developed in line with contract requirements and organisational policy and procedures
	1.6 A **contract administration strategy** is developed or **obtained** and key details are entered from the contract
2 **Establish and maintain contract administration arrangements**	2.1 Start-up or transition arrangements are confirmed and implemented in accordance with contract requirements and organisational procedures
	2.2 **Communication**/information strategies are established to meet contractor and organisational needs
	2.3 Risks management plan is monitored for effectiveness and adapted as necessary during the life of the contract
	2.4 Relationship with contractor is established and managed in accordance with organisational policy and procedures
	2.5 Specialist expertise is obtained as necessary for progress meetings and for advice on/resolution of

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		contract issues
	2.6	Contract information/documentation is maintained for organisational purposes in accordance with organisational policy and procedures
3 **Monitor and maintain the performance of a contract**	3.1	Obligations to the contractor are met in accordance with contractual arrangements and the organisation's financial management requirements
	3.2	Performance of the contract is monitored against performance indicators to ensure all obligations under the agreement are being met
	3.3	Contract **variations** are managed in accordance with the contract and organisational policy and procedures
	3.4	**Disputes**/complaints are investigated and **resolved** or referred in accordance with contractual requirements
	3.5	**Negotiation** of issues relating to the contract is managed and approvals are obtained in accordance with stipulations in the contract proper
	3.6	Communication/reporting on the performance of the contract is maintained with all stakeholders in accordance with organisational protocols and public sector standards
4 **Complete and review contract**	4.1	Contracts are finalised, amended, cancelled or terminated in accordance with contractual arrangements
	4.2	Strategies to manage close-out, renewal of the contract or transition to a new contract meet organisational guidelines and public sector standards
	4.3	**Review** is undertaken of contract administration, contractor performance relevant to measures at each stage of the contract, user satisfaction and audit results, when necessary
	4.4	Where measures or outcomes are not met in full, variances are documented and explained
	4.5	Information from the review (and audit) is used to report on contractor performance, to review

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contract administration practice and make recommendations for improvement

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

using communication and negotiation with contractors and other stakeholders involving oral and written exchanges

networking with diverse clients, contractors and end users

responding to diversity, including gender and disability

reading and applying complex documents such as contracts, legislation and guidelines

applying occupational health and safety and environmental requirements in the context of contract administration

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

Commonwealth/State/Territory Government legislation, policies, practices and guidelines relating to contract administration, including environmental purchasing guidance

contract performance management

privacy and confidentiality issues

probity principles and issues

whole-of-life considerations

equal employment opportunity, equity and diversity principles

financial and accounting issues relevant to the contract

public sector legislation including occupational health and safety and environment

Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor,

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Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together	**Pre-requisite units** that **must** be achieved **prior** to this unit: **Nil** **Co-requisite units** that **must** be assessed **with** this unit: **Nil** **Co-assessed units** that **may** be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to: PSPETHC401A Uphold and support the values and principles of public service PSPGOV404B Develop and implement work unit plans PSPGOV408A Value diversity PSPGOV411A Deal with conflict PSPGOV412A Use advanced workplace communication strategies PSPGOV422A Apply government processes PSPLEGN401A Encourage compliance with legislation in the public sector PSPPOL404A Support policy implementation
Overview of evidence requirements	In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms: the knowledge requirements of this unit the skill requirements of this unit application of the Employability Skills as they relate to this unit (see Employability Summaries in Qualifications Framework) administration of contracts in a range of (3 or more) contexts (or occasions, over time)
Resources required to carry out assessment	These resources include: legislation, policy, procedures and protocols relating to contract administration case studies and workplace scenarios to capture the range of contract administration

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	situations likely to be encountered
Where and how to assess evidence	Valid assessment of this unit requires: a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when administering contracts, including coping with difficulties, irregularities and breakdowns in routine administration of contracts in a range of (3 or more) contexts (or occasions, over time) Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as: people with disabilities people from culturally and linguistically diverse backgrounds Aboriginal and Torres Strait Islander people women young people older people people in rural and remote locations Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of: case studies portfolios questioning scenarios authenticated evidence from the workplace and/or training courses
For consistency of assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

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Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in **italics** in the Performance Criteria is explained here.

Contracts may also include	memoranda of understanding/memoranda of agreement
	in-house option directives
	common use arrangements/standing offers
	inter/intra-government agreements
	letters of intent
	licensing agreements
Specialists may include	procurement and/or contracting area
	corporate finance area
	outsourced procurement/contracting advisers
	legal advisers
	functional/business area
	business owner of the contract
	appropriate cross-government department experts
Key contract clauses may include	variation
	insurances
	notices
	disputes
	intellectual property
	privacy
	confidentiality
	milestones
	payments
	breaches
	penalties

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Risks might include	contractor inability to meet agreements end user or buyer inability to meet obligations limited number of suppliers
Contract administration strategy may include	formal contract administration plan contract administration check list setting up routines checking quality assurance systems transfer of legal responsibility avoiding implied acceptance of varied conditions through non-enforcement of contractual obligations
Contract administration strategy may be obtained from	procurement/contracting area specialist contract managers central agencies such as state supply boards, contract and management services finance area legal advisers outsourced providers of contracting services
Effective communication strategies may include	setting regular times to talk, meet or check on progress protocols for dealing with other stakeholders emergency contact arrangements a diary system to monitor milestones, timeframes, receipt of deliverables etc strategies for ensuring information flow at critical stages of the contract
Variation to agreements may include	change of scope negotiation of new terms and conditions dissolution of contracts in writing verbal variations, confirmed in writing variations by action/inaction
Disputes may include	disputes over:

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	requirements delivery schedules price changes additional tasking payment schedules complaints from third parties
Techniques available to resolve disputes include	conference negotiation mediation arbitration resort to contractual agreements legal considerations
Negotiation of issues may include	contract variations continuous improvement innovations non-compliance consequences
Review may include	planning process evaluation considerations at each stage of the contract sources and methods of gathering data role of audit trails, where applicable measuring outputs meeting client needs innovation strategies for continuous improvement

Unit Sector(s)

Competency field

Procurement&Contract Management

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PSPPROC406B Procure goods and services

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit covers the expenditure of public monies for simple procurement of low value/low risk goods and services using contractual arrangements that include simple tendering and requests for quotation. The unit requires analysis and decision making in the procurement process, which is undertaken under limited supervision. It includes planning and undertaking procurement, managing contractors and completing contractual arrangements. In practice, procuring goods and services overlaps with other generalist and specialist public sector or local government work activities, such as upholding and supporting the values and principles of public service, identifying and treating risks, exercising delegations, applying government processes, encouraging compliance with legislation in the public sector or local government, planning procurement, developing and distributing requests for offers, selecting providers and managing contracts. This unit is not recommended for those who specialise in procurement. It cannot be included in the Certificate IV in Government (Procurement and Contracting). No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to those who enter into contracts or go out to tender or manage the procurement but are not procurement professionals. Those undertaking this unit may be developing a request for tender but procurement is not a major part of their role.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. **Plan for procurement of goods or services**.	1.1. ***Market assessment*** is used to identify and select options for procuring goods or services in accordance with business plan requirements, legislation, policy and procedures, and ***probity requirements***. 1.2. ***Commercial strategy*** is identified to achieve the procurement outcome set out in the business plan, achieve value for money, and meet legal and probity requirements. 1.3. Risk planning is conducted for the procurement activity according to procedures, delegations and guidelines.

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ELEMENT	PERFORMANCE CRITERIA
	1.4. Process and criteria for evaluation of offers from suppliers or service providers are identified to meet public sector probity requirements, and are recorded in a tender evaluation plan. 1.5. Procurement plan is developed to manage procurement process and ***contractual arrangements*** in accordance with ***legislation***, ***policy and procedures***, ***and probity requirements***. 1.6. ***Stakeholders*** are consulted about the planned procurement and their feedback is incorporated into the procurement process.
2. **Undertake procurement**.	2.1. ***Method for requesting and receiving offers*** is chosen to suit the procurement activity and comply with organisational policy and procedures and probity requirements. 2.2. Specialist expertise is used to assist in evaluation of offers as required. 2.3. Evaluation and selection of the offer are made according to tender evaluation plan, and organisational policy and procedures. 2.4. Notification of successful and unsuccessful suppliers/providers is undertaken according to procurement plan, and organisational policy and procedures. 2.5. Work does not commence and payment is not made until contractual arrangements are formalised. 2.6. Contractual arrangements that are legally binding to all parties and suitable to the procurement activity are negotiated, formalised and ***reported*** according to organisational policy and procedures.
3. **Manage contractors**.	3.1. Communication strategies are established to build and maintain relationships with contractors. 3.2. Performance is monitored against contract performance indicators for quality assurance of the goods or services and to ensure compliance with contract specifications. 3.3. Contract performance indicators are regularly reviewed to ensure relevance. 3.4. Approvals are obtained for contract variations according to organisational and contractual requirements. 3.5. Disputes or complaints are investigated, documented and resolved or referred according to contractual

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ELEMENT	PERFORMANCE CRITERIA
	provisions. 3.6. Contractual obligations to contractors are met. 3.7. ***Records*** are maintained according to organisational and legal requirements to provide an audit trail and for other ***organisational purposes***.
4. **Complete contractual arrangements**.	4.1. Goods and services received are confirmed as meeting contractual specification and required outcome, and accounts are processed for payment according to organisational procedures. 4.2. Contracts are finalised, cancelled or terminated according to contractual arrangements. 4.3. Contract performance, outcomes and management processes are evaluated, and lessons learnt are recorded and used to inform ongoing contract management practices.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - write procurement specifications in unambiguous terms
  - consult and negotiate with providers
  - write, read and/or sign contractual agreements that may include complexity of language and style, using templates where appropriate
  - engage in ongoing communication with contractors that may involve explaining or clarifying written and oral information, note-taking at meetings, active listening, and checking for understanding
  - provide feedback
- teamwork skills to:
  - work independently or under direction as appropriate to the situation
  - model team leadership approaches if appropriate
  - respond to diversity
  - refer issues to the correct person
- problem-solving skills to:
  - evaluate procurement options and select the most suitable option

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REQUIRED SKILLS AND KNOWLEDGE

• assess goods or services provided against specifications
• initiative and enterprise skills to apply OHS, environmental, sustainability and corporate social responsibility practices in the context of government procurement activities
• planning and organising skills to:
  • manage contractor performance against contract requirements
  • make payments and manage financial arrangements
• learning skills to keep up-to-date with relevant procurement legislation, policies and procedures
• technology skills to:
  • operate organisational IT systems
  • use electronic procurement templates

Required knowledge

• commonwealth, state or territory, and local government legislation, policies, practices and guidelines:
  • relating to contract management, including environmental purchasing and corporate social responsibility guidance
  • such as OHS and equity and diversity
• organisational procurement policies, practices and approval processes
• organisation's code of conduct and code of ethics
• procurement options and methods
• probity and ethical issues
• codes of conduct, codes of practice and standards of individual behaviour relating to procuring goods and services, in particular identifying and managing conflict of interest, gifts and inappropriate relationships with providers
• procedures for receipt and payment of goods or services
• common use arrangements
• procurement approval procedures
• financial accountability requirements
• aspects of contract law, laws of tort, trade practices law, commercial law and other legislation relating to receipt and evaluation of offers, negotiation and award of contracts

Evidence Guide

EVIDENCE GUIDE
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment

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EVIDENCE GUIDE	
Guidelines for the Training Package.	
Overview of assessment	Competency must be demonstrated in the ability to procure goods and services consistently in accordance with legislative and organisational requirements.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Assessment must confirm the ability to: • plan a procurement activity, using templates where these are available, to a level of detail commensurate with the complexity and risk profile of the procurement • implement the procurement plan in a way that reflects the legislative and policy environment applicable to the organisation • develop a suitable contract management plan, using templates if available • manage the performance of contractors to ensure that the goods or services are delivered in accordance with the contract • act within own delegations and refer issues to higher authority when necessary. **Consistency in performance** Competency should be demonstrated by providing evidence of undertaking a range of relevant work tasks in an actual or simulated procurement environment on at least two separate occasions.
Context of and specific resources for assessment	The unit of competency is to be assessed in the workplace or a simulated workplace environment. Access may be required to: • legislation, policy, procedures and protocols relating to procuring goods and services • codes of conduct and codes of practice • workplace scenarios and case studies relating to a range of procurement activities • case studies that incorporate dilemmas, and probity requirements relating to procurement of goods and services.
Method of assessment	The following assessment methods are suggested: • questions to assess understanding of relevant legislation and procedures • review of strategies selected for procurement • review of procurement plans, requests for quotation/tender, tender evaluation plans, selection reports, contracts, contract

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EVIDENCE GUIDE	
	management plans and reports, and other documentation prepared by the candidate in a range of contexts • feedback from peers or supervisors on actions taken to monitor and review contract performance. In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. Questioning techniques should suit the language and literacy levels of the candidate.
Guidance information for assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • PSPETHC401A Uphold and support the values and principles of public service • PSPGOV417A Identify and treat risks • PSPGOV421A Exercise delegations • PSPLEGN401A Encourage compliance with legislation in the public sector • PSPPROC411A Plan procurement • PSPPROC412A Develop and distribute requests for offers • PSPPROC413A Select providers and develop contracts • PSPPROC414A Manage contracts.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Market assessment may include:	• structure of the market • number and quality of providers • factors and conditions which may affect supply of goods or provision of services

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RANGE STATEMENT	
	• potential impact of intended procurement activity.
Evaluation of options may include:	• stakeholder consultation • confirmation that procurement is necessary • development of a business case • comparison of internal and outsourced provision.

Probity requirements:	• may include:
	  • accountability
	  • transparency
	  • confidentiality
	  • managing conflict of interest
	  • impartiality
	• are maintained to:
	  • encourage conformity to processes
	  • facilitate accountability
	  • ensure proponents are treated in a fair and equitable manner
	  • encourage commercial completion
	  • preserve public and private sector confidence in government processes.

Key elements of a ***commercial strategy*** may include:	• consultation with key stakeholders • expenditure budget meets organisational requirements for probity and accountability • procurement process agreed by users and documented, and meets legal and probity requirements • approvals obtained • contractual arrangements that capture and address identified risks, protection of all parties, and include performance indicators that provide the basis for due performance.
Contractual arrangements may include:	• verbal and written orders • purchase order • government credit cards • petty cash • memoranda of understanding/memoranda of agreement • in-house service level agreements • contracts • standing offers • inter and intra-government agreements.
Legislation, ***policy and***	• commonwealth or state and territory legislation

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RANGE STATEMENT	
procedures and probity requirements may include:	• council rules and by-laws • equal employment opportunity and anti-discrimination law • commonwealth, and state or territory government procurement guidelines, including environmental purchasing guidelines • organisational policies and practices • probity guidelines • financial management requirements.
Stakeholders may include:	• end users, customers or clients, and sponsors • current or potential providers or suppliers • technical or functional experts or advisers • commonwealth, state or territory, and local government • the organisation • other public sector organisations • employees, unions and staff associations • industry bodies • local communities • lobby groups and special user groups.
Methods for requesting and receiving offers may include:	• requests for quotation • direct purchases using existing supply agreements, such as standing offers • oral quotations • written quotations • direct purchases from retail or wholesale outlets • electronic commerce.
Reporting may include:	• gazettal notices • public notification • Gazette Publishing System (GaPS) • electronic • verbal • annual reports • internal and/or external • statistical reports.
Records may include:	• purchase requests and orders • simple procurement submissions and proposals • invoices and payment requests • statements and petty cash vouchers • offer and contract documents • evaluation process documentation

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RANGE STATEMENT	
	• records of authorised decisions • corporate credit card transaction statements • records of supplier performance • gazettal notices • financial statements • asset registers • records of conversation • actions taken to manage identified conflict of interest.
Organisational purposes may include:	• reports and other documents • future procurement planning and contract management • accountability requirements • Ministerials.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Procurement and Contract Management

Co-requisite units

Co-requisite units	

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PSPPROC502A Establish contract management arrangements

Modification History

Unit Descriptor

This unit covers the establishment of arrangements for contract management by officers whose primary role is contract management, and who may or may not have had involvement in the procurement process preceding execution of the contract.

PSPPROC410A Administer contracts is the appropriate unit for officers undertaking contract management as a minor part of their work role.

The unit includes confirming contract requirements, preparing a contract management plan, implementing contract strategies and implementing contractual arrangements.

In practice, establishing contract management arrangements may overlap with other public sector generalist and specialist work activities such as acting ethically, complying with legislation, providing client service, providing leadership, developing policy, undertaking negotiations.

This is one of 4 units of competency in the **Procurement&Contract Management** Competency field that address the requirements of contract management performed by specialist contract managers.

Related units are:

PSPPROC501A Manage contract riskPSPPROC503A Manage contract performancePSPPROC504A Finalise contracts

The superseded unit **PSPPROC404A Manage contracts** is equivalent to the three units:

PSPPROC502A Establish contract management arrangements + PSPPROC503A Manage contract performance PSPPROC504A Finalise contracts

Equivalence may be claimed for EITHER:

PSPPROC410A Administer contracts ORPSPPROC502A - 504A inclusive, but not both.

This is a new unit of competency, added to the **Procurement&Contract Management** Competency field of the Training Package in 2004.

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Application of the Unit

Licensing/Regulatory Information

Pre-Requisites

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in **bold italics** is explained in the Range Statement following.

Elements and Performance Criteria

Elements and Performance Criteria

Element	Performance Criteria
1 **Confirm contract requirements**	1.1 **Legislation**, **public sector standards and organisational requirements** relating to **probity**, financial management, approvals and **other considerations** are identified for inclusion in the **contract** management plan
	1.2 Contract **requirements** are re-confirmed with all parties
	1.3 Obligations to the contractor, limits of authority and **delegations** relating to the contract are determined in accordance with contractual arrangements and organisational policy and procedures
	1.4 Start-up or transition arrangements are confirmed
2 **Prepare contract management plan**	2.1 Contract **risks** are identified and a risk management plan is developed in line with contract requirements and organisational policy and procedures
	2.2 Procedures to identify, receive and address contract **variations** are determined in accordance with the

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		contractual requirements and organisational procedures
		2.3 **Procedures** to investigate, resolve or refer **disputes**/complaints are determined in accordance with contractual requirements and organisational procedures
		2.4 Key performance indicators are developed/negotiated and **administrative processes** are identified and approved for the life of the contract in accordance with organisational procedures
		2.5 **Contract management plan** that addresses all key elements is documented, approved and maintained in accordance with organisational requirements
		2.6 Ethical behaviour, probity and privacy principles are applied to all elements of the contract management plan
3	**Implement contract strategies**	3.1 The requirements of confidentiality/freedom of information are identified for the contract
		3.2 Communication requirements are identified/confirmed in line with contractual obligations and the needs of **stakeholders**
		3.3 A **communication/information strategy** is developed that matches the needs of the organisation, the contract and the contractor's business environment
		3.4 Contract review requirements are established with stakeholders
		3.5 A **contract review strategy** is developed to review management of the contract, contractor performance and user satisfaction
4	**Implement contractual arrangements**	4.1 Business relationship with contractor is established and managed in accordance with organisational policy and procedures
		4.2 Start-up or transition arrangements are implemented
		4.3 Financial, administrative and information

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management processes are established

4.4 Contractual arrangements are implemented in accordance with the contract management plan

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

communication and negotiation with contractors and other stakeholders involving complex oral and written exchanges

networking with diverse clients, contractors and end users

responding to diversity, including gender and disability

reading and applying complex documents such as contracts, legislation and guidelines

applying occupational health and safety and environmental requirements in the context of contract management

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

Commonwealth/State/Territory Government legislation, policies, practices and guidelines relating to contract management, including environmental purchasing guidance

contract management planning for a range of contractual situations

privacy and confidentiality issues

probity principles and issues

whole-of-life considerations

equal employment opportunity, equity and diversity principles

financial and accounting issues relevant to the contract

public sector legislation including occupational health and safety and environmental

Evidence Guide

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The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together	**Pre-requisite units** that **must** be achieved **prior** to this unit: **Nil** **Co-requisite units** that **must** be assessed **with** this unit: **Nil** **Co-assessed units** that **may** be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to: PSPETHC501B Promote the values and ethos of public service PSPGOV505A Promote diversity PSPGOV507A Undertake negotiations PSPGOV508A Manage conflict PSPGOV511A Provide leadership PSPGOV512A Use complex workplace communication strategies PSPLEGN501B Promote compliance with legislation in the public sector PSPPROC501A Manage contract risk PSPPROC503A Manage contract performance PSPPROC504A Finalise contracts
Overview of evidence requirements	In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms: the knowledge requirements of this unit the skill requirements of this unit application of the Employability Skills as they relate to this unit (see Employability Summaries in Qualifications Framework) contract management arrangements established in a range of (3 or more) contexts (or occasions, over time)
Resources required to carry out	These resources include:

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assessment	legislation, policy, procedures and protocols relating to contract management case studies and workplace scenarios to capture the range of contract management situations likely to be encountered
Where and how to assess evidence	Valid assessment of this unit requires: a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when establishing contract management arrangements, including coping with difficulties, irregularities and breakdowns in routine contract management arrangements established in a range of (3 or more) contexts (or occasions, over time) Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as: people with disabilities people from culturally and linguistically diverse backgrounds Aboriginal and Torres Strait Islander people women young people older people people in rural and remote locations Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of: case studies demonstration portfolios projects questioning scenarios authenticated evidence from the workplace and/or training courses

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For consistency of assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in **italics** in the Performance Criteria is explained here.

Legislation, **standards and organisational requirements may include**	financial management legislation government procurement/purchasing/contracting legislation, policy and guidelines public sector standards ethics standards codes of conduct/ethics environmental purchasing
Probity principles are	accountability transparency confidentiality management of conflicts of interest maintained to: ensure conformity to processes facilitate accountability ensure proponents are treated in a fair and equitable manner encourage commercial competition, where appropriate preserve public and private sector confidence in government processes

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Other considerations may include	corporate governance
	intellectual property
	privacy
	freedom of information requirements
	public liability insurance considerations
Contracts may include	memoranda of understanding/memoranda of agreement
	in-house option directives
	common use arrangements/standing offers
	inter/intra-government agreements
	letters of intent
	licensing
	purchases from suppliers
Contract requirements may include	terms and conditions
	specifications
	risk
	managing hospitality
	clauses dealing with:
	variations
	insurance/s
	notices
	disputes
	intellectual property
	privacy
	confidentiality
	milestones
	payments
	breaches
Delegations may include	compliance with instructions or finance circulars
	special consideration if they concern:
	long-term travel deals
	long-term computer deals

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	long-term lease deals
	issuing of indemnities
	other delegates
	confirmation by chief financial officer
	Ministerial authorisation
Risks might include	environmental factors
	suppliers' inability to meet agreements
	end users' or buyers' inability to meet obligations
	limited number of suppliers
	implications if dependence on one suppler is enshrined versus risks in lack of continuity and consistency of services provided
Variation to agreements may include/arise from	change of scope
	negotiation of new terms and conditions
	dissolution of contracts
Procedures to resolve disputes may include	conference
	negotiation
	mediation
	arbitration
	resort to contractual agreements
	legal considerations
Disputes may include	disputes over:
	requirements
	delivery schedules
	price changes
	additional tasking
	payment schedules
	complaints from third parties
Administrative processes may include	file/records management
	audit trail

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	recording meetings
	notes and follow-ups of meetings and actions agreed
	management reporting
Contract management plan may include	risk management plan
	contingency plan
	communication/public relations plans
	human resource management plan
	disposal plan
	contract review plan
	setting up routines
	checking quality assurance systems
	transfer of legal responsibility
	insurances
	strategies to avoid implied acceptance of varied conditions through non-enforcement of contractual obligations
	environmental/green issues
	industry policy
Stakeholders may include	contractor
	organisation
	board of management
	steering committee
	industry
	advisory panel
	clients
	users
	Parliamentarians
	the public
Communication/ information strategies may include	setting regular times to talk, meet or check on progress
	protocols for dealing with other stakeholders
	appeals mechanisms for resolving conflict between clients and service providers

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	clear communication
	reliability
	emergency contact arrangements
	a diary system to monitor milestones, timeframes, receipt of deliverables etc
	strategies for ensuring information flow at critical stages of the contract
Contract review strategymay include	planning process
	evaluation considerations at each stage of the contract
	sources and methods of gathering data
	role of audit trails
	measuring outputs
	meeting client needs
	innovation
	strategies for continuous improvement

Unit Sector(s)

Competency field

Procurement&Contract Management

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PSPPROC503B Manage contract performance

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit covers the competency required by people whose primary role is contract management to implement strategies that ensure effective contract performance. It includes managing the business relationship, performance of the contract, and contract issues; and implementing a communication strategy. In practice, managing contract performance may overlap with other public sector and local government generalist and specialist work activities, such as promoting the values and ethos of public service or local government, undertaking negotiations, promoting compliance with legislation in the public sector, finalising contracts, managing procurement risk, planning to manage a contract, planning for procurement outcomes and making procurement decisions. PSPPROC414A Manage contracts is the appropriate unit for people undertaking contract management as a minor part of their work role. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	This unit applies to those who may or may not have had involvement in the procurement process preceding execution of the contract.

Licensing/Regulatory Information

Not applicable.

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Pre-Requisites

Not applicable.

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. **Manage the business relationship**.	1.1. ***Probity*** is managed in accordance with organisational requirements, ***legislation***, ***policy and public sector standards***. 1.2. Obligations to the contractor are met according to contractual arrangements. 1.3. Consideration of conflicts of interest and their resolution are recorded according to public sector standards and organisational requirements. 1.4. Business relationship with contractor is managed in the public interest through ***formal and informal mechanisms*** according to public sector standards and organisational policy and procedures.
2. **Manage performance of the contract**.	2.1. Start-up or transition arrangements are implemented according to contract requirements and organisational procedures. 2.2. ***Contract management plan*** is monitored for effectiveness on a regular basis and adapted as necessary during the life of the contract. 2.3. Performance of ***contract*** is monitored against key performance indicators and tracking milestones to

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ELEMENT	PERFORMANCE CRITERIA
	ensure obligations under the agreement are being met. 2.4. E-procurement, financial and other resources are managed as necessary according to contract requirements and organisational procedures. 2.5. Emerging and potential ***risks*** are identified and managed according to organisational risk management procedures.
3. **Manage contract issues**.	3.1. Contract ***variations*** are managed according to contract management plan, organisational policy and procedures, and probity requirements. 3.2. ***Early signs of under-performance*** are identified, and ***action is taken to improve performance*** to the agreed level and documented according to contract's communication and information policy. 3.3. ***Disputes*** and complaints are investigated and ***resolved*** or referred according to contract's management plan and contractual arrangements. 3.4. ***Negotiation of issues*** relating to the contract is conducted and approvals are obtained according to stipulations in the contract. 3.5. Conflict is addressed and resolved where possible or other ***actions*** are taken according to contractual arrangements. 3.6. Non-compliance with codes of conduct, codes of practice and standards of behaviour is dealt with in a timely manner.
4. **Implement communication and information strategy**.	4.1. ***Communication*** on the performance of the contract is maintained with all stakeholders according to organisational protocols and public sector standards. 4.2. Management reporting is carried out according to tracking milestones and organisational requirements. 4.3. ***Contract information*** is maintained for ***organisational purposes*** according to organisational policy and procedures.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - consult and negotiate with contractors and stakeholders, involving complex oral and written exchanges of information
  - network, within probity boundaries, with contractors and stakeholders
  - read complex documents, such as contracts, legislation and guidelines
  - write management reports and keep records of meetings, liaison, notes and follow-up actions
  - provide feedback
- teamwork skills to:
  - build effective working relationships with contractors and stakeholders, within probity boundaries
  - model effective team management approaches
  - respond to diversity
  - refer issues to the correct person
- problem-solving skills to:
  - resolve disputes, conflict and complaints
  - make judgements about when to refer disputes, conflict and complaints to others
  - apply understanding of supplier issues/supply chain management in the context of contract management
- initiative and enterprise skills to:
  - apply the content of complex documents, such as contracts, legislation and guidelines
  - apply OHS, environmental, sustainability and corporate social responsibility practices in the context of contract management
- planning and organising skills to:
  - manage contract documentation
  - plan and organise contract meetings, reports and reviews
- learning skills to keep up-to-date with:
  - best practice examples in procurement practice
  - relevant procurement legislation, policies and procedures
- technology skills to:
  - operate organisational IT systems
  - use electronic procurement templates

Required knowledge

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REQUIRED SKILLS AND KNOWLEDGE

• commonwealth, state or territory, and local government legislation, policies, practices and guidelines:
  • relating to contract management, including environmental purchasing and corporate social responsibility guidance
  • such as OHS and equity and diversity
• organisational procurement policies, practices and approval processes
• contract management for a range of contractual situations
• privacy and confidentiality issues
• probity principles and issues
• codes of conduct, codes of practice and standards of individual behaviour relating to management of contracts and relationships with contractors
• whole-of-life considerations
• financial and accounting issues relevant to the contract
• legal aspects of negotiation
• aspects of law of contracts, trade practices law and commercial law relevant to the management of contracts relating to complex procurement
• equal employment opportunity relevant to the management of contracts
• OHS requirements relevant to the management of contracts
• environmental, sustainability and corporate social responsibility principles relevant to the management of contracts

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	Competency must be demonstrated in managing contract performance consistently in accordance with legislative and organisational requirements.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Assessment must confirm the ability to: • develop and implement an appropriate contract management plan, using templates where available • develop and implement an appropriate transition plan, using templates where available • develop and maintain a sound business relationship with contractors within probity guidelines, upholding probity standards in all dealings with them

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EVIDENCE GUIDE	
	• manage contractor performance so that goods and services are delivered according to the contract • provide the contractor with performance feedback • deal promptly and proactively with contract issues and disputes and refer to higher authority when this is not possible • communicate effectively with internal and external stakeholders about the operation of the contract. **Consistency in performance** Competency should be demonstrated by providing evidence of undertaking a range of relevant work tasks in an actual or simulated procurement environment on at least two separate occasions.
Context of and specific resources for assessment	The unit of competency is to be assessed in the workplace or a simulated workplace environment. Access may be required to: • legislation, policy, procedures and protocols relating to procuring goods and services and managing contracts • codes of conduct and codes of practice • workplace scenarios and case studies relating to a range of procurement activities associated with managing contract performance • case studies that incorporate dilemmas and probity requirements relating to managing contract performance.
Method of assessment	The following assessment methods are suggested: • questions to assess understanding of relevant legislation and procedures • review of strategies and approaches adopted for managing contract performance • review of contract management plans, contracts, contract variations, contractor performance reports, communication strategy and other documentation prepared by the candidate in a range of contexts • review of stakeholder engagement approaches adopted by the candidate. In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. Questioning techniques should suit the language and literacy levels of the candidate.
Guidance information	Evidence must be gathered over time in a range of contexts to

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EVIDENCE GUIDE	
for assessment	ensure the person can achieve the unit outcome and apply the competency in different situations or environments. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example: • PSPETHC501B Promote the values and ethos of public service • PSPGOV507A Undertake negotiations • PSPLEGN501B Promote compliance with legislation in the public sector • PSPPROC504B Finalise contracts • PSPPROC505A Manage procurement risk • PSPPROC506A Plan to manage a contract • PSPPROC507A Plan for procurement outcomes • PSPPROC508A Make procurement decisions.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	

Probity principles:	• may include:
	  • accountability
	  • transparency
	  • confidentiality
	  • managing conflict of interest
	  • impartiality
	• are maintained to:
	  • ensure conformity to processes
	  • facilitate accountability
	  • ensure proponents are treated in a fair and equitable manner
	  • encourage commercial completion
	  • preserve public and private sector confidence in government processes.

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RANGE STATEMENT	
Legislation, policy and public sector standards may include:	• financial management legislation • government procurement, purchasing and contracting legislation, policy and guidelines • council rules and by-laws • public sector standards • codes of conduct, codes of practice and standards of individual behaviour • cross-cultural and social justice issues • environmental and sustainability policies • corporate social responsibility policies.
Formal and informal mechanisms may include:	• non-confrontational interaction • hospitality • formal contract variations • formal negotiations • formal and informal meetings • regular and *ad hoc* reporting • review processes.
Contract management plan may include:	• risk management plan • contingency plan • communication and public relations plan • human resource management plan • disposal plan • contract review plan • setting up routines • quality assurance systems • arrangements for transfer of legal responsibility • insurances • strategies to avoid implied acceptance of varied conditions through non-enforcement of contractual obligations • environmental/green procurement, sustainability and corporate social responsibility principles.
Contracts may include:	• formal written contracts • standing offers (panels) • multi-use lists and similar arrangements • inter and intra-government agreements • letters of intent • memoranda of understanding and memoranda of agreement • licensing agreements

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RANGE STATEMENT	
	• in-house option directives.
Risks may include:	• supplier inability to meet obligations • end user or buyer inability to meet obligations • scope creep • client requirements not fully understood • becoming too dependent on a single supplier • disruption to continuity and consistency of service if too many suppliers are selected • other environmental influences • corruption risks • probity risks.
Variation to agreements may arise from:	• change of scope • negotiation of new terms and conditions • dissolution of contracts • inability to deliver.
Early signs of under-performance may be detected through:	• tracking milestones • regular meetings • meeting records and follow-up • file management and audit trail • stakeholder surveys on performance • ongoing review of deliverables.
Actions taken to improve performance may include:	• discussion with contractor • regular interaction • ongoing performance feedback • provision of support • expert advice.

Disputes may include:	• disputes over:
	  • requirements
	  • delivery schedules
	  • price changes
	  • additional tasking
	  • payment schedules
	• complaints from third parties
	• formal and informal.

Techniques available to ***resolve*** disputes include:	• conference • negotiation • mediation • arbitration • resort to contractual conditions

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RANGE STATEMENT	
	• litigation.
Negotiation of issues may include:	• contract variations • continuous improvement • innovations • non-compliance • consequences.
Actions as a result of unresolved conflict may include:	• mediation • court action • termination of contract.
Communication strategies may include:	• clear communication • understanding the needs of the service provider and the client • setting regular times to talk, meet or check on progress • protocols for dealing with other stakeholders • emergency contact arrangements • diary system to monitor milestones, timeframes, receipt of deliverables, etc. • strategies for ensuring information flow at critical stages of the contract.
Contract information may include:	• contract and variations • contract management plan • financial records, including funding submissions, budgets, delegations, invoices and payments • contractor performance information • contract reports • information about disputes and other issues • complaints and compliments.
Organisational purposes may include:	• probity and accountability • budget reporting • feeding into future procurement processes • performance management of suppliers • internal and external reviews and audits • governance requirements • legal compliance.

Unit Sector(s)

Not applicable.

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Competency field

Competency field	Procurement and Contract Management

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PSPPROC504B Finalise contracts

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit covers the ability to finalise processes for contracts. It includes completing contracts and implementing a contract review strategy. In practice, finalising contracts may overlap with other public sector generalist and specialist work activities, such as promoting the values and ethos of public service and local government, undertaking negotiations, promoting compliance with legislation in the public sector or local government, managing contract performance, managing procurement risk, planning to manage a contract, planning for procurement outcomes and making procurement decisions. PSPPROC414A Manage contracts is the appropriate unit for people undertaking contract management as a minor part of their work role. No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Application of the Unit

Application of the unit	The unit applies to those whose primary role is contract management.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units	

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Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. **Complete contracts**.	1.1. ***Contracts*** due to expire are reviewed to determine future requirements, and options for meeting those requirements are canvassed in sufficient time for decision making and transition to occur. 1.2. Strategies are implemented to manage closure, renewal of contracts, or transition to a new contract according to organisational guidelines, probity requirements and public sector standards. 1.3. Contracts are finalised, amended, cancelled or terminated according to contractual arrangements. 1.4. Consultation is undertaken with contractor, and a contract completion report is issued addressing the performance of contractor and contract manager according to organisational requirements and public sector standards.
2. **Implement contract review strategy**.	2.1. ***Timing of contract review*** is determined to ensure a smooth transition to post-contract arrangements. 2.2. ***Contract review*** is undertaken covering contract management, contractor performance relevant to measures at each stage of the contract, user satisfaction and audit results.

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ELEMENT	PERFORMANCE CRITERIA
	2.3. Where measures or outcomes are not met in full, ***variances*** are documented and explained. 2.4. Review report is prepared documenting outcomes against plans, final costs, user satisfaction, lessons learnt and any shortcomings in contract planning, management policies and procedures. 2.5. Recommendations for improvement are made and supported with evidence, as a result of lessons learnt.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to:
  - consult and negotiate with contractors and stakeholders, involving complex oral and written exchanges of information
  - write review and closure reports
  - make recommendations about improvements to the contract management process
  - provide feedback
- teamwork skills to:
  - model effective team management approaches
  - respond to diversity
  - refer issues to the correct person
- problem-solving skills to finalise outstanding issues so the contract can be closed
- initiative and enterprise skills to identify improvements to the contract management process of contract management
- planning and organising skills to:
  - manage contract closure documentation
  - plan and organise contract closure meetings, reports and reviews
- learning skills to keep up-to-date with:
  - best practice examples in procurement practice
  - relevant procurement legislation, policies and procedures
- technology skills to:
  - operate organisational IT systems

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REQUIRED SKILLS AND KNOWLEDGE
• use electronic procurement templates
Required knowledge

• commonwealth, state or territory, and local government legislation, policies, practices and guidelines:
  • relating to contract finalisation and review, including environmental purchasing and corporate social responsibility guidance
  • such as OHS and equity and diversity
• organisational procurement policies, practices and approval processes
• contract finalisation and review for a range of contractual situations
• privacy and confidentiality issues, including the requirement to appropriately classify information to ensure transparency as well as to treat bids as commercial-in-confidence
• probity principles and issues
• codes of conduct, codes of practice and standards of individual behaviour relating to finalising contracts
• information, knowledge management and record keeping for official or historical records
• equal employment opportunity
• financial and accounting issues relevant to the contract
• aspects of contract law, trade practices law and commercial law relevant to the finalisation of contracts relating to complex procurement

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	Competency must be demonstrated in the ability to finalise contracts consistently in accordance with legislative and organisational requirements.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Assessment must confirm the ability to: • develop and implement an appropriate review strategy for contracts that are ending • complete relevant contract closure processes • ensure appropriate records have been kept • apply contract review techniques

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EVIDENCE GUIDE	
	• make written recommendations for improvements to the procurement process based on review results • uphold probity standards in all dealings with contractors. **Consistency in performance** Competency should be demonstrated by providing evidence of undertaking a range of relevant work tasks in an actual or simulated procurement environment on at least two separate occasions.
Context of and specific resources for assessment	The unit of competency is to be assessed in the workplace or a simulated workplace environment. Access may be required to: • legislation, policy, procedures and protocols relating to procuring goods and services, and managing and finalising contracts • codes of conduct and codes of practice • workplace scenarios and case studies relating to a range of procurement activities associated with finalising contracts • case studies that incorporate dilemmas, and probity requirements relating to finalising contracts.
Method of assessment	The following assessment methods are suggested: • questions to assess understanding of relevant legislation and procedures • review of strategies and approaches adopted for finalising contracts • review of contract management plans, contracts, contract variations, contractor performance reports, contract closure plans, transition plans, risk assessments and other contract finalisation documentation prepared by the candidate in a range of contexts • review of stakeholder engagement approaches adopted by the candidate. In all cases, practical assessment should be supported by questions to assess underpinning knowledge and those aspects of competency which are difficult to assess directly. Questioning techniques should suit the language and literacy levels of the candidate.
Guidance information for assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

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EVIDENCE GUIDE	
	• PSPETHC501B Promote the values and ethos of public service • PSPGOV507A Undertake negotiations • PSPLEGN501B Promote compliance with legislation in the public sector • PSPPROC503B Manage contract performance • PSPPROC505A Manage procurement risk • PSPPROC506A Plan to manage a contract • PSPPROC507A Plan for procurement outcomes • PSPPROC508A Make procurement decisions.

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Contracts may include:	• formal written contracts • standing offers (panels) • multi-use lists and similar arrangements • inter and intra-government agreements • letters of intent • memoranda of understanding and memoranda of agreement • licensing agreements • in-house option directives.
Timing of contract review may include:	• periodically throughout the contract • when performance issues arise • prior to contract completion • concurrently with contract renewal process • after the contract is completed.
Contract review may include:	• planning process • evaluation considerations at each stage of contract • sources and methods of gathering data • role of audit trails • measuring outputs

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RANGE STATEMENT	
	• key performance indicators and their review • meeting client needs • innovation • strategies for continuous improvement.
Variances may include:	• change of scope • negotiation of new terms and conditions • strategies for dealing with contractor performance • dissolution of contract.

Unit Sector(s)

Unit sector	

Competency field

Competency field	Procurement and Contract Management

Co-requisite units

Co-requisite units	

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PSPPROC602B Direct the management of contracts

Modification History

Unit Descriptor

This unit covers management of contracts for strategic purchases to effectively minimise risks and achieve value for money to meet an organisations core objectives. It includes managing contract establishment, performance and evaluation.

In practice, directing the management of contracts may overlap with other public sector generalist and specialist work activities such as acting ethically, applying government systems, managing resources, managing client services, managing risk, etc.

This unit replaces and is equivalent to PSPPROC602A Direct the management of contracts.

Application of the Unit

Licensing/Regulatory Information

Pre-Requisites

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements are the essential outcomes of the unit of competency.

Together, performance criteria specify the requirements for competent performance. Text in **bold italics** is explained in the Range Statement following.

Elements and Performance Criteria

Elements and Performance Criteria

Element	Performance Criteria
1 **Manage contract establishment**	1.1 The requirements of **contracts and strategic initiatives** are discussed, clarified, and agreed by all parties
	1.2 Responsibilities for establishing and carrying out

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	procedures are assigned to achieve contract outcomes
	1.3 Effective communication strategies and processes are established and implemented to assist ongoing communication between **stakeholders** and contractors
	1.4 Relationship management is undertaken at all levels of personnel involved in procurement and contract management
	1.5 Strategic relationships are established and managed to improve procurement capability and performance
	1.6 Risk management plans are updated in accordance with organisational policy and procedures
2 **Manage contract performance**	2.1 Progress of contracts is **monitored** against set targets and performance measures to ensure success of procurement activities
	2.2 Should monitoring find that set targets and performance measures are not being met, action is taken to rectify performance in a timely manner
	2.3 Advice and support are provided to solve problems, make improvements and maintain progress
	2.4 Opportunities to improve procurement outcomes are sought and negotiated with contractors
	2.5 Approvals are provided/gained for contract **variations** negotiated and agreed between the parties
	2.6 Opportunities are provided for stakeholders and contractors to have input into and receive feedback on progress during the performance contracts
3 **Manage contract evaluation**	3.1 Evaluation of contract performance is undertaken relative to planned performance measures and in consultation with stakeholders and contractors
	3.2 Where stakeholders and contractors do not agree, dispute resolution is undertaken in accordance with organisational policy and procedures

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3.3 Conclusions are detailed against agreed criteria to provide a complete picture of **performance of contractors**, the organisation's **procurement processes** and **value for money**

3.4 The performance of strategic initiatives is measured relative to planned outcomes in consultation with industry and other stakeholders

3.5 Lessons learnt from evaluations of contracts and strategic initiatives are documented in accordance with organisational requirements and used to continuously improve future procurement activities

3.6 Contractors and stakeholders are advised of evaluation outcomes in a timely manner in accordance with organisational guidelines

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

Skill requirements

Look for evidence that confirms skills in:

managing strategic relationships

reading and applying complex, formal documents such as contracts, legislation and guidelines and applying them to contract management and industry development

networking with diverse clients, contractors and end users

responding to diversity, including gender and disability

problem solving, including conceptual and reasoning skills

undertaking research and analysis

managing financial and other resources

measuring the performance of strategic initiatives

applying occupational health and safety and environmental requirements in the context of contract management

Knowledge requirements

Look for evidence that confirms knowledge and understanding of:

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Commonwealth/State/Territory Government legislation, policies, practices and guidelines relating to contract management, including environmental purchasing guidance

aspects of law of contract, trade practices law, commercial law relating to contract management

probity principles and issues

government procurement environment

legal requirements of government contracting

financial rules and regulation requirements

implications of particular contracting arrangements

whole-of-life considerations

procurement management processes

equal employment opportunity, equity and diversity principles

cultural issues relating to contract management and industry development

relationship management at all different levels of personnel

public sector legislation including occupational health and safety and environment

Evidence Guide

The Evidence Guide specifies the evidence required to demonstrate achievement in the unit of competency as a whole. It must be read in conjunction with the Unit descriptor, Performance Criteria, the Range Statement and the Assessment Guidelines for the Public Sector Training Package.

Units to be assessed together	**Pre-requisite units** that **must** be achieved **prior** to this unit: **Nil** **Co-requisite units** that **must** be assessed **with** this unit: **Nil** **Co-assessed units** that **may** be assessed with this unit to increase the efficiency and realism of the assessment process include, but are not limited to: PSPETHC601B Maintain and enhance confidence in public service PSPLEGN601B Manage compliance with legislation in the public sector PSPGOV601B Apply government systems

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	PSPMNGT602B Manage resources PSPMNGT604B Manage change PSPMNGT606B Manage quality client service PSPMNGT608B Manage risk PSPPROC604A Plan for strategic procurement PSPPROC605A Coordinate strategic procurement PSPPROC606A Negotiate strategic procurement
Overview of evidence requirements	In addition to integrated demonstration of the elements and their related performance criteria, look for evidence that confirms: the knowledge requirements of this unit the skill requirements of this unit application of the Employability Skills as they relate to this unit (see Employability Summaries in Qualifications Framework) direction of contract management in a range of (3 or more) contexts (or occasions, over time) including 1 non-traditional procurement/finance activity such as a strategic initiative for industry development
Resources required to carry out assessment	These resources include: legislation, policy, procedures and protocols relating to contract management case studies and workplace scenarios to capture the range of situations likely to be encountered when directing the management of contracts
Where and how to assess evidence	Valid assessment of this unit requires: a workplace environment or one that closely resembles normal work practice and replicates the range of conditions likely to be encountered when directing the management of contracts, including coping with difficulties, irregularities and breakdowns in routine

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	direction of contract management in a range of (3 or more) contexts (or occasions, over time) including 1 non-traditional procurement/finance activity such as a strategic initiative for industry development Assessment methods should reflect workplace demands, such as literacy, and the needs of particular groups, such as: people with disabilities people from culturally and linguistically diverse backgrounds Aboriginal and Torres Strait Islander people women young people older people people in rural and remote locations Assessment methods suitable for valid and reliable assessment of this competency may include, but are not limited to, a combination of 2 or more of: case studies portfolios questioning scenarios authenticated evidence from the workplace and/or training courses
For consistency of assessment	Evidence must be gathered over time in a range of contexts to ensure the person can achieve the unit outcome and apply the competency in different situations or environments

Range Statement

RANGE STATEMENT

The Range Statement provides information about the context in which the unit of competency is carried out. The variables cater for differences between States and Territories and the Commonwealth, and between organisations and workplaces. They allow for

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different work requirements, work practices and knowledge. The Range Statement also provides a focus for assessment. It relates to the unit as a whole. Text in **italics** in the Performance Criteria is explained here.

Contracts and strategic initiatives may include	non-traditional procurement/finance activities
	strategic procurement activities such as industry development
	in-house option directives
	inter/intra-government agreements
	memoranda of understanding/memoranda of agreement
	public private partnerships
	purchases from suppliers
Stakeholders may include	end users
	customers/clients
	sponsors
	potential providers/suppliers
	current providers/suppliers
	technical or functional experts or advisers
	Federal, State/Territory and/or Local Government
	the organisation
	other public sector organisations
	employees
	unions or staff associations
	industry bodies
	local communities and society as a whole
	lobby groups, special user groups
Monitoring may involve	progress meetings
	visits to the contractor's premises
	provision of samples
	regular progress reports from the contractor
	independent audit
	end user feedback

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Contract variation may include	modification of:
	targets
	performance measures
	procurement plans
	resourcing
	monitoring and evaluation processes
Evaluation of contractor performance may include	strengths and weaknesses
	client acceptance of service delivery (client satisfaction)
	achievements in meeting delivery and completion dates
	compliance with other contractual requirements
	performance in relation to relevant policy objectives such as industry development, care for the environment, occupational health and safety, and affirmative action
	achievement of the contractor in developing Australian and New Zealand supply networks
	general relationships including effectiveness of communication at all levels
	performance of key technical personnel
	acceptability and cost of whole-of-life technical support including lead times and availability of spares and maintenance services
	achievements in innovation and quality improvement programs
	acceptability and suitability for future agreements including potential status as an approved contractor
Evaluation of the organisation's procurement processes may focus on	effectiveness of project management including the project plan and the responsibilities and accountabilities set out in it
	quality of the business case, as indicated by the achievement of planned outcome and the contribution to program objectives

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	effectiveness of contractor qualification processes
	value obtained in bid clarification and post-tender negotiation
	effectiveness of project management systems, focusing particularly on management information
	effectiveness of risk management
	methods for controlling variations in cost, time, quality and performance from the initial planning to completion
	adequacy of safeguards against fraud, error and impropriety
	incidence of material losses due to waste or inefficiency
	overall performance in terms of cost, time, service and quality
Value for money must reflect	whole-of-life program benefits
	residual values
	costs of parts
	servicing and maintenance
	industry benchmarks

Unit Sector(s)

Competency field

Procurement&Contract Management

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SIRXQUA001A Develop innovative ideas at work

Modification History

Not applicable.

Unit Descriptor

Unit descriptor This unit describes the performance outcomes, skills and knowledge required to systematically generate and develop innovative ideas in the workplace.

Application of the Unit

Application of the unit This unit requires the skills to interpret or observe a need and develop a detailed idea. It involves the creative generation and discussion of a number of ideas or solutions, accepting positive and negative feedback, and testing ideas in order to establish and present a workable outcome that meets the needs of the end user.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units Nil

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Employability Skills Information

Employability skills The required outcomes described in this unit contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit is packaged will assist in identifying employability skills requirements.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Interpret the need for innovation.	1.1 Observe the need for ***innovation*** within workplace context.
	1.2 Challenge assumptions about products and processes to identify opportunities for innovation.
	1.3 Project possible future contexts and environments for the innovation.
	1.4 Define ***end user requirements***.
	1.5 Identify ***resources and constraints***.
	1.6 Research ***factors and ethical considerations*** that may impact on the idea.
	1.7 Access relevant ***organisational knowledge***.
2 Generate ideas.	2.1 Conceptualise ideas using a range of ***creative thinking techniques***.

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ELEMENT	PERFORMANCE CRITERIA
	2.2 Apply relevant knowledge to explore a range of approaches.
	2.3 Seek ***stimulation from alternative sources***.
	2.4 Test ideas against brief and other factors.
	2.5 Select preferred option.
3 Collaborate with others.	3.1 Develop ideas in conjunction with ***relevant people***.
	3.2 Seek and accept ***feedback*** from relevant people in an appropriate fashion.
	3.3 Modify ideas according to feedback.
	3.4 Maintain and utilise a ***network of peers*** to discuss ideas.
4 Analyse and reflect on ideas.	4.1 Analyse ideas from different perspectives.
	4.2 Use appropriate strategies to capture ***reflections***.
	4.3 Examine ideas to ensure they meet context requirements, best practice and future needs.
	4.5 Allow time for the development and analysis of ideas.
5 Represent ideas.	5.1 Select an appropriate ***communication technique*** for the target ***audience***.
	5.2 Develop the ***presentation of the idea*** with the audience in mind.
	5.3 Present the idea to educate and inform the client.
	5.4 Modify the idea according to client feedback.
6 Evaluate ideas.	6.1 ***Review*** ideas using appropriate ***evaluation methods*** to ensure they meet required needs.
	6.2 Modify ideas as required.

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Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

The following skills must be assessed as part of this unit:

- interpersonal communication skills to:
  - collaborate with others and represent ideas through clear and direct communication
  - ask questions to identify and confirm requirements
  - use language and concepts appropriate to cultural differences
  - use and interpret non-verbal communication
- research skills
- networking
- lateral thinking
- the ability to analyse self and external factors
- time management skills.

The following knowledge must be assessed as part of this unit:

- relevant technical knowledge
- broad industry and market knowledge
- organisational culture
- social, environmental and work culture impacts
- principles of innovation.

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, the range statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • interprets the need for innovation in the workplace • identifies resources and constraints and researches

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EVIDENCE GUIDE

	affecting factors when generating innovative ideas • generates ideas using creative thinking techniques • tests ideas against brief and other relevant factors • presents and discusses ideas with relevant people • seeks feedback and modifies ideas accordingly • analyses and reflects on ideas to ensure they meet end user requirements • presents ideas using appropriate communication methods • reviews and modifies idea using appropriate evaluation methods.
Context of and specific resources for assessment	Assessment must ensure access to: • a real or simulated work environment • relevant documentation, such as store policy and procedures manuals • a range of communication equipment.
Methods of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit: • observation of performance in the workplace • third-party reports from a supervisor • a detailed case study • written or verbal questioning to assess knowledge and understanding • review of portfolios of evidence and third-party workplace reports of on-the-job performance. Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.
Assessing employability skills	Employability skills are integral to effective performance in the workplace and are broadly consistent across industry sectors. How these skills are applied varies between occupations and qualifications due to the different work functions and contexts. Employability skills embedded in this unit should be

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EVIDENCE GUIDE

	assessed holistically in the context of the job role and with other relevant units that make up the skill set or qualification.

Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. ***Bold italicised*** wording in the performance criteria is detailed below.

Innovation may include:	• generating new ideas or solutions • developing new uses for old ideas and making them useful or a means of improvement.
End user requirements may refer to:	• who will be using the end product • why the product or process is needed • how will it be used • advantages will it provide • where it will be used.
Resources and constraints may include:	• time required • costs • equipment • human resources • work culture • management practice • technology needed.
Factors and ethical considerations may include:	• aesthetic requirements • functionality • information available • OHS • environmental considerations.

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RANGE STATEMENT

Organisational knowledge may include:	• technical knowledge • information gained from books and audiovisual resources • knowledge from different work areas • information from work colleagues • work processes • product • materials • systems • tools • working conditions.
Feedback may be:	• formal or informal • verbal • in writing • in groups • individual.
Creative thinking techniques may include:	• brainstorming • visualising • making associations • building on associations • telling stories • creative writing • lateral thinking games • mind mapping, drawings • six thinking hats • using prompts.
Stimulation from alternative sources may include:	• reading books and industry journals • talking with colleagues and friends • visiting art galleries and museums • going to industry workshops • networks.

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RANGE STATEMENT

Relevant people may include:	• colleagues • team members • supervisors • managers • the client.
Maintaining a ***network of peers*** may include:	• participating in forums • participating in industry training • attending workshops • becoming a member of a network.
Capture of ***reflections*** may include:	• mind mapping • assessing alternatives • drawing comparisons • imagining possible outcomes • imagining best and worst case scenarios.
Communication techniques may include:	• writing a proposal • building a model • showing a film • presenting a talk • preparing a report • drawing a diagram.
The ***audience*** may include:	• external contacts • internal contacts, such as management and other team members • groups or individuals • people from a range of social, cultural and ethnic backgrounds and with varying physical and mental abilities.
Presentation of ideas may	• helping the client visualise and understand the idea

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RANGE STATEMENT

include:	• actively listening • asking questions • accepting others opinions • explaining the proposal • clarifying details.
Formal review of the idea may involve:	• checking that the idea can be implemented • that it meets the client and end user needs • best practice • financial requirements • resource requirements.
Evaluation methods may include:	• developing checklists • discussing the process with colleagues or supervisors • writing a report of the outcomes.

Unit Sector(s)

Sector Cross-Sector

Competency field

Competency field Quality and Innovation

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SIRXQUA002A Lead a team to foster innovation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor This unit describes the performance outcomes, skills and knowledge required to lead a workplace team in ways that foster innovative work practices.

Application of the Unit

Application of the unit This unit covers the skills needed by individuals leading work teams on individual projects or for work in general. The skills encompass the requirements for encouraging innovation within individual team members as well as a team as a whole. They include how to put a team together and keep it working well, how to structure work and monitor progress, how to ensure the team members have the information and skills they need and how to apply innovative work skills to the leadership role.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units Nil

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Employability Skills Information

Employability skills The required outcomes described in this unit contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit is packaged will assist in identifying employability skills requirements.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Organise team to maximise innovation.	1.1 Analyse the performance requirements for the ***team***. 1.2 Gather ***information*** about ***team members***. 1.3 Acknowledge strengths and weaknesses of individual team members. 1.4 Assign team roles to ensure a match between work requirements and individual team members' capacities. 1.5 Select team members to foster cross-fertilisation of ideas.
2 Organise work assignments within team to facilitate innovative work practices.	2.1 Structure and organise work to enable innovation. 2.2 ***Communicate*** work assignments to team members in ways that ***encourage and reinforce*** team-based innovation. 2.3 Allocate tasks and activities to ensure the best use of team skills.

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ELEMENT	PERFORMANCE CRITERIA
	2.4 Ensure work assignments include timelines that allow for innovation.
3 Provide guidance and coaching to team members on innovation in the workplace.	3.1 Encourage team members to work collaboratively on work assignments. 3.2 Encourage team members to share work information, knowledge and experiences in their day-to-day work. 3.3 Encourage team members to seek ***external stimuli and knowledge*** and to set up and maintain networks. 3.4 Provide appropriate ***guidance*** to team members on the use of innovation in the workplace. 3.5 Coach team members to ensure they have the enabling skills to implement innovation in the workplace.
4 Provide a model of innovative work practice.	4.1 Share case studies and examples of the use and benefits of innovative work practices within teams with team members. 4.2 Ensure examples of the way innovative skills can be applied in the workplace are provided by the team leader. 4.3 Demonstrate the ***qualities of an effective team member***, as team leader in working with the team. 4.4 Promote and reinforce the value placed by the organisation on innovation.
5 Monitor the team's ongoing use of innovative work practices.	5.1 Actively encourage team members to reflect on team activities and opportunities for improvement and innovation. 5.2 Evaluate team activities based on ***feedback*** from team members, management, ***clients*** and other interested people. 5.3 Receive ***suggestions for work improvements*** in a positive manner, and act on them where appropriate. 5.4 Review and record ***evidence*** of the application of innovative work skills, and present findings as appropriate. 5.5 Review the innovation process and discuss and

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ELEMENT	PERFORMANCE CRITERIA
	constructively analyse both positive and negative outcomes.
6 Provide feedback on the use of innovative work skills.	6.1 Debrief team members after work and ***training and evaluation*** exercises. 6.2 Discuss feedback from review processes within the team and use it to inform future planning. 6.3 Celebrate successful innovations and ***reward*** the team appropriately. 6.4 Discuss problems in the use of innovation in a constructive way.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the essential skills and knowledge and their level, required for this unit.

The following skills must be assessed as part of this unit:

- ability to apply innovative work skills in own work
- interpersonal communication skills to:
  - communicate work assignments
  - provide guidance and coaching and provide feedback through clear and direct communication
  - ask questions to identify and confirm requirements
  - share information
  - give instructions
  - use language and concepts appropriate to cultural differences
  - use and interpret non-verbal communication
- leadership skills
- motivational skills
- counselling and consoling skills
- conflict resolution skills
- evaluation skills

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REQUIRED SKILLS AND KNOWLEDGE

- matching staff competencies to task requirements.

The following knowledge must be assessed as part of this unit:

- innovative work skills
- leadership principles
- techniques for evaluating team performance
- an understanding of group dynamics in a team
- coaching and learning principles.

Evidence Guide

EVIDENCE GUIDE

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, the range statement and the Assessment Guidelines for this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the following is essential: • organises team to maximise innovation, including gathering information on team members, assigning team roles and selecting team members • organises work assignments within team to foster innovation • provides guidance and coaching to team members on innovation in the workplace • provides a model of innovative work practice • monitors the team's ongoing use of innovative work practice.
Context of and specific resources for assessment	Assessment must ensure access to: • a retail work environment • relevant documentation, such as store policy and procedures manuals • a range of communication equipment • a team.

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EVIDENCE GUIDE

Methods of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- observation of performance in the workplace
- third-party reports from a supervisor
- written or verbal questioning to assess knowledge and understanding
- review of portfolios of evidence and third-party workplace reports of on-the-job performance.

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.

Assessing employability skills

Employability skills are integral to effective performance in the workplace and are broadly consistent across industry sectors. How these skills are applied varies between occupations and qualifications due to the different work functions and contexts.

Employability skills embedded in this unit should be assessed holistically in the context of the job role and with other relevant units that make up the skill set or qualification.

Range Statement

RANGE STATEMENT

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. ***Bold italicised*** wording in the performance criteria is detailed below.

Team may include:

- small work team
- store team
- corporate team.

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RANGE STATEMENT

Information may include:

- work preferences
- past jobs
- interests
- working styles
- lifestyle preferences.

Team members may:

- come from a variety of social, cultural or ethnic backgrounds
- vary in literacy and numeracy skills
- vary in competencies.

Methods used to ***communicate*** may include:

- writing a proposal
- building a model
- showing a film
- presenting a talk
- preparing a report
- drawing a diagram.

Ways to ***encourage and reinforce*** team-based innovation may include:

- supportive communication
- allowing follow-through with ideas
- providing enough but not too much guidance and structure
- providing training and learning opportunities.

External stimuli and knowledge may come from:

- technical experts
- other organisations
- journals
- the internet
- networks.

Guidance may include:

- coaching
- mentoring
- counselling
- skills training
- modelling.

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Qualities of an effective team member may include capacity to be:	• fair • responsible • collaborative • reflective • sympathetic • equitable • hardworking.
Feedback may be sought and given:	• verbally • in writing • through presentations • at informal and formal meetings.
Clients may include:	• new and existing clients • internal or external clients • customers with a range of social, cultural and ethnic backgrounds and physical and mental abilities • customers with routine or special needs.
Evidence may include:	• feedback from team members or other staff • feedback from clients or work-based managers • work-related statistics and reports.
Suggestions for work improvements may be received from:	• supervisors • team members • peers • clients • the learners • subject experts.
Training and evaluation may:	• relate to: existing staff competencies

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level of competencies required by staff

- be supervised by:
  - supervisor or manager
  - training coordinator
  - external consultant.

Rewards and promotion of innovation may include:

- positive feedback presentation to peers and higher management
- prizes
- certificates
- positive reinforcement through articles in newsletters.

Unit Sector(s)

Sector Cross-Sector

Competency field

Competency field Quality and Innovation

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